



**Midlands**  
IRELAND

# Midlands Regional Food & Drink Skills Needs Audit





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# Abbreviations

1. DEIS - Delivering Equality of Opportunity in Schools
2. EU-JTF - European Union Just Transition Fund
3. RUN-EU - Regional University Network
4. TUS - Technological University of the Shannon
5. FET - Further Education and Training
6. LEO - Local Enterprise Office

# Acknowledgements

We would like to thank all interviewees for their time and expertise. We sincerely appreciate the time you took to contribute to this skills audit and hope you are satisfied with the outcomes.

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**Report prepared by:**  
**Technological University of the Shannon**





# Executive Summary

The Midlands Regional Food and Drink Strategy was published in 2021 to cover the period 2021-2024. Under theme three of the Enabling Activities section of the report, which focused on 'Fostering Innovation and Nurturing Capability', there was a call to survey Midland Food and Drink manufacturers and hospitality sector operators to assess skills gaps.

This report, written by Technological University of the Shannon responds to this action point, covering Counties Laois, Longford, Offaly, and Westmeath.

The aim of the report is to support the region with provision of data and good practice case studies, identifying strengths, weaknesses, opportunities and threats. Target groups for the report include, but are not limited to, education providers, food and drink, tourism and state support organisations, SMEs, including craft and larger scale food and drink producers and related organisations.

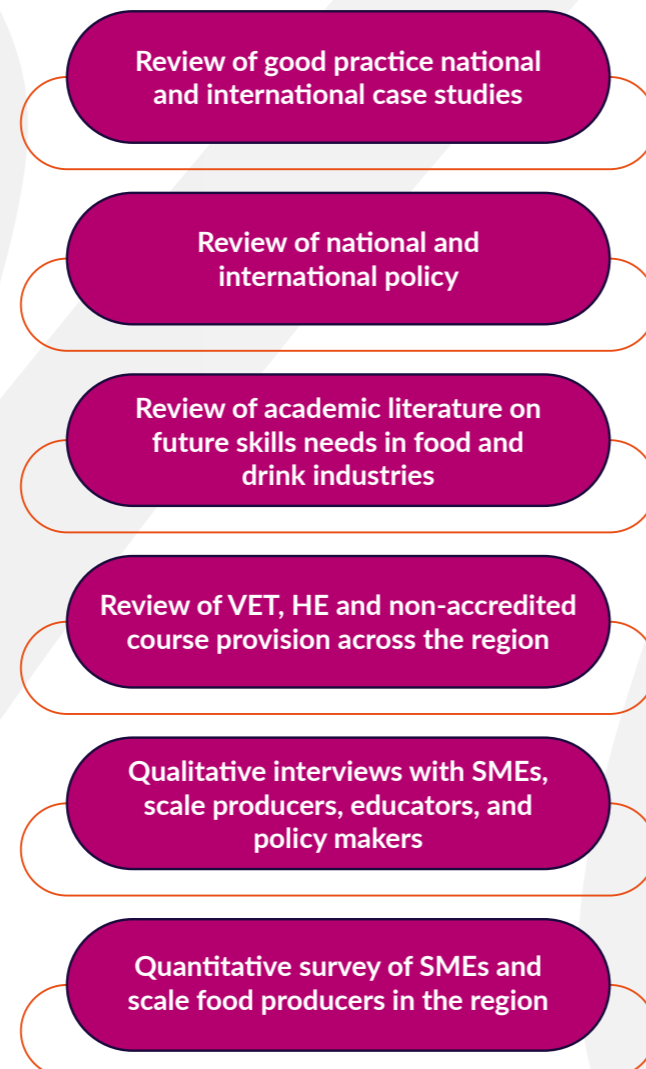
The report is compiled from international good practice, national and regional policy, academic literature and primary data analysis. Primary and secondary research was conducted in the period October 2023 - February 2024.

The report was peer reviewed during the writing process by academic partners and members of the Midlands Regional Enterprise Plan Food and Drink Working Group. The research process was presented at:

- The RUN-EU PLUS Annual International Conference on Applied Research with Business and Society (ICARUS 3), held online in December 2023.

- The MREP Regional Food & Drink Strategy to 2024 F&D Skills Survey Kick-off Meeting.
- The Midlands Regional Enterprise Plan Steering Committee Meeting November 2023, held in Offaly County Council Chamber in Tullamore in November 2023.

The report is based on the following data collection phases:



## International Case Studies

The international good practice case examples were provided by Technological University of the Shannon's Regional University Network partners. RUN-EU is an alliance of nine like-minded higher education institutions drawn from all regions of Europe. TUS partners in this alliance include NHL Stenden (Netherlands), Polytechnic University of Leiria (Portugal), Polytechnic of Cávado and Ave (Portugal), Häme University of Applied Sciences (Finland), University of Győr - Széchenyi István University (Hungary), FHV Vorarlberg University of Applied Sciences (Austria), University of Howest (Belgium) and University of Burgos (Spain). These partners contributed an opening focus group to the project, a mid-term review and shared good practice case studies. This knowledge transfer will benefit the region by bringing in ideas from outside Ireland.

A case study on Alentejo (Portugal) and relevant European projects are included in the report.



Figure 1: RUN EU Locations

## National and Regional Policy

National and regional policy was examined as a desk-based exercise with reports from Fáilte Ireland, Bord Bia, the BIA Innovator Campus, County Councils, regional enterprise plans, Teagasc, and other relevant state bodies. Where possible, we obtained the most up to date policy documents available, reviewed them and have summarised lessons learned for the region.

Results from the policy analysis indicated firstly that Ireland and the regions have coped well with three extraordinary crises in a row over the past 6-8 years, including 1) Brexit and the implications for Irish supply chains and export, 2) COVID19 and the implications for labour mobility, and 3) the rapid period of inflation in the years 2022-2023 as a result of the war in Ukraine and rising commodity prices.

### Review of academic literature on future skills needs in food and drink industries.

Academic literature used to inform the report was drawn from peer reviewed academic publications and academic books. A key book read for the study was the influential **The Fate of Food: What We'll Eat in a Bigger, Hotter, Smarter World** by Amanda Little, which explores climate change, nutrition and dietary change, demographic change and most importantly, technological change.

Results from the academic literature highlighted the dynamic landscape of the food industry, encompassing digitalisation, supply chain transformations, Industry 4.0, and the crucial role of entrepreneurial skills in SME success. Papers analysed included case studies from Norway, the UK, and Malaysia specifically. The future skill needs of food and drink (SMEs) are expected to evolve in response to continued periods of automation and digitalisation of manufacturing.

As digitalisation, artificial intelligence, and Industry 4.0 continue to shape all sectors and not just the food and drink sector, it is inevitable there will be increased demand for STEM skills in the region. Beyond traditional competencies in food production and management, the academic papers suggested that SMEs are likely to seek professionals equipped with technological proficiency, data analysis skills, and a deep understanding of smart manufacturing processes.

We identified ten skillsets from the literature which included (presented in alphabetical order):

- **Data Analysis and Interpretation Skills**
- **Digital Literacy and Technology Skills**
- **Food Safety and Quality Assurance Management**
- **Nutrition and Health Expertise in the context of market research and consumer demand**
- **Regulatory Knowledge in labour management**
- **Soft skills, including Innovation and Creativity, Cultural and Culinary Awareness**
- **Supply Chain Management in the context of scaling up**
- **Sustainability and Environmental Leadership**
- **Technical Robotics and Automation Knowledge in food production**
- **Technical Scientific Knowledge in food production**

## Review of FET, HE and non-accredited course provision across the region

The findings from the academic literature must not however, be privileged over the findings from the policy document analysis and primary research findings. Interviews showed that soft-skills remain paramount; with entrepreneurial skills, including adaptability, innovation, and strategic thinking, remaining crucial for navigating the dynamic landscape of the food industry and the challenging macro environment.

Results from analysis of course provision in the region showed that there is a wide range of provision across all the QQI levels, from skills and craft based short courses, right up to full postgraduate awards.

While food science is not offered as prominently perhaps as in the Dublin or Munster regions, it is available within programmes in the region. Courses in the region include culinary, food science, leadership and management, engineering, robotics and automation, among other related disciplines.

## Qualitative interviews with SMEs, scale producers, educators, and policy makers

The following points emerged from the interviews with course providers, SMEs, policy makers and large-scale food producers:

- **Investment is required in provision of resources in the ETBs and universities, including with provision of expertise in the future of food;**
- **Better promotion of existing courses is required to primary and secondary level students to stimulate interest in the food sector as a career path;**

- **Recognition must be given that food and drink hospitality and food science related courses need to continue, even if demand is low from the student perspective;**
- **Structures need to facilitate attraction of teaching talent into the course (e.g. there is a shortage of home economics teachers which makes provision of relevant courses challenging in the ETBs)**
- **Courses related to food and drink, such as those in the culinary apprenticeships, tourism, hospitality disciplines need to be retained to provide skills for the region**
- **Additionally, a focus on sustainability practices and awareness of global supply chain intricacies emerged as integral for SMEs (and the region) as all actors across the four counties face varying carbon targets and evolving consumer sentiment associated with sustainable characteristics of the business. Continuous learning and the ability to embrace emerging technologies will be paramount, making a commitment to lifelong education a valuable asset for individuals seeking success in the future of food and drink SMEs.**

## Quantitative survey of SMEs and scale food producers in the region

**Company Demographics:** The surveyed companies were dispersed across the Midlands, with varying sizes and years of operation in the food and drink sector. Most companies who responded have fewer than 10 employees, operate for more than five years, and are engaged in diverse sectors, including Bakeries, Beverages, Catering/ Cookery Training, Farmers Markets, Dairy, Meat, Preserves, Organics, Prepared Foods, Confectionary, Produce, Support Services.

**Skills Importance Ranking:** When seeking to employ or upskill staff, the surveyed companies prioritised various skills differently. Digital literacy and technology skills, marketing, sales, and food safety and quality assurance management were considered crucial. The importance of sustainability skills and eco-friendly practices is evident, with companies emphasising their commitment to organic practices and waste reduction.

**Challenges in Recruiting:** Companies face challenges in recruiting staff with skills in food safety, sales, management, and technical expertise. Finding individuals willing to work flexible hours, having a strong work ethic, and possessing motivation are recurrent themes.

**Strategies to Address Skills Gaps:** Companies employ diverse strategies to bridge skills gaps, including training programs, partnerships with educational institutions, and collaboration with local authorities. However, some smaller businesses rely on internal efforts, and challenges such as identifying skill gaps amid rapid growth are acknowledged.

**Sustainability Initiatives:** The majority of companies believe they are actively implementing sustainability initiatives, including local sourcing, waste reduction, energy efficiency, and eco-friendly packaging. However, challenges such as the cost of sustainable goods and awareness of social responsibility persist.

**Support Needed for Sustainability:** Companies express a need for support in materials sourcing, food science, and production skills. Funding for renewable energy, sales and business training, and financial assistance for implementing sustainable practices are highlighted.

**Challenges in Implementing Sustainability:** Implementing sustainable practices faces challenges such as the cost of renewable packaging, lack of locally available ingredients, and resistance from staff. Companies also grapple with the balance between sustainability and business growth.

**Skills Needed for Future Growth:** In general, the companies surveyed expect their employee numbers to grow in the near future, and they plan to provide training in areas such as food safety, sustainability, soft skills, and marketing.

**Collaboration and Awareness:** There is a willingness among companies to collaborate with other SMEs, educational institutions, and industry bodies to address common challenges. Collaboration types include knowledge sharing, marketing, product development, and joint purchasing.

**Perception of the Midlands Food and Drink Industry:** Opinions on local pride and national awareness of the Midlands food and drink industry vary. While some express positivity, others see room for improvement in both local and national recognition.

**Upskilling and Training Preferences:** Requests for upskilling and training courses include industry-specific food safety, food science, marketing, and sustainable nutrition. Companies expressed interest in a Midlands food cluster for collaborative networking.

**Visitor Experience and Directory Awareness:** Some companies offer a visitor experience, indicating potential for tourism collaboration. Awareness of the Midlands Ireland Regional Food & Drink Producers Directory varies among respondents.

**Final Thoughts on Talent Attraction:** Suggestions for attracting and retaining talent include recognising the region's challenges, fair compensation, strong promotion of local produce, educational initiatives, and collaborations with tourism.

## Eight Report Recommendations

Eight report recommendations for the region are summarised below. There is a clear need to have a dedicated regional resource such as a Regional Food & Drink Programme Manager to ensure that the recommendations are fully resourced and progressed.

### Recommendation 1:

Design and deliver a **LEARNING JOURNEY** for influential stakeholders from the Midlands region to visit and learn from a good practice destination. This could be, for example, to a region with similar characteristics to the Midlands that has successfully developed an international reputation for its food and drink industry. Learning would comprise site visits, meetings, presentations and training from the host destination. Funding streams to be identified.

### Recommendation 2:

Establish a **CENTRALISED WEBSITE** promoting all available food related courses in the region. Suggest that this be hosted by Midlands Regional Food and Drink Directory.

### Recommendation 3:

**INVEST IN FOOD TOURISM PRIDE** in the region – the analysis demonstrated a need to continue to develop and support pride in regional food products – this could be through ongoing course, workshops, seminars, training events. Suggest that this activity is continued on an on-going basis between Fáilte Ireland, County Council and Just Transition Activators.

### Recommendation 4:

Establish additional **MARKETS AND EVENTS** in the region.

### Recommendation 5:

Design and deliver, short and pointed **TRAINING COURSES ON FOOD VISITOR ATTRACTION DEVELOPMENT**. Low numbers of food SMEs offer visitor experiences in the region and this needs to be addressed to boost the range of activities in the region and the reputation and association between food and place.

### Recommendation 6:

Develop a **SHORT-ADVANCED PROGRAMME (SAP)** on The Future of Food in Regional Europe led by Technological University of the Shannon in conjunction with local industry and TUS' RUN-EU partners.

### Recommendation 7:

Fund a **POST-GRADUATE RESEARCH STUDENT** - Support post-graduate research in food and drink policy development in the Midlands region through funding a collaborative research project between policy makers, TUS and RUN-EU partners. Funding streams to be identified.

### Recommendation 8:

**RETAIN EXISTING PROVISION OF FOOD AND DRINK RELATED SKILLS PROGRAMMES** in the region even during a low demand cycle.





# Introduction



# Introduction

## Overview of the Midlands Region

The Midlands comprises County Laois, County Longford, County Offaly, and County Westmeath, with a population of approximately 320,000 people (CSO) and a territory of 6,652 km<sup>2</sup>, 9.5% of the total area of the state. Key infrastructure in the region includes the M6 motorway, connecting Dublin to the West, the M7 motorway connecting Dublin to the Midwest, the M8 connecting the Midlands to Cork, and a rail line connecting Dublin to the principal towns of Longford, Portlaoise, Athlone, Mullingar and Tullamore and other lines connecting towns in the region to Sligo, Westport, Ballina and Galway.



Figure 2: Portlaoise, Laois Tourism

The physical geography of the region is important to note in the context of food history and heritage, with the River Shannon, Lough Ree, lowland bogs, eskers, the Slieve Bloom mountains, and both native and plantation forests, comprising some of the major geographical features. From a regional branding perspective, the Midlands region is situated in two of Ireland's Regional Destination Brands as developed and promoted by Fáilte Ireland, with Counties Westmeath, Longford and Offaly within Ireland's Hidden Heartlands and County Laois within Ireland's Ancient East.

The Midlands region boast a major campus of the

Technological University of the Shannon: Midlands Midwest, which was founded in 2021 following the merge of Athlone Institute of Technology and Limerick Institute of Technology. The university is a member of the Regional University Network, a major European University Alliance, with members in Portugal, Spain, the Netherlands, Belgium, Finland, Hungary, and Austria. Other universities in close proximity include ATU's Galway campus, SETU's Carlow campus, the University of Galway, and Maynooth University.

Major (non-food) employers in the region include the Technological University of the Shannon (approximately 600 employees in Athlone), Ericsson (approximately 1,200 employees in Athlone), the Department of Education (approximately 600 employees in Athlone), the State Examinations Commission (approximately 200 employees in Athlone), Novo Nordisk (approximately 450 employees in Athlone), Abbott (Longford) employs over 5,500 people across ten sites across Ireland, with a significant number in Longford Town, Center Parcs (approximately 1,200 in Longford).

Some of the nationally and internationally recognised food brands based in the Midlands Region include the brands profile below, which represent all four counties and many food sectors, ranging from bakeries to dairy to meat to the drinks industry.



Figure 3: Athlone, Fáilte Ireland Content Pool

Some of the nationally and internationally recognised food brands based in the Midlands Region include the brands profile below, which represent all four counties and many food sectors, ranging from bakeries to dairy to meat to the drinks industry.

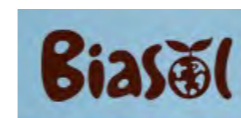
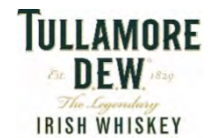


Table 1: A sample of well-known food and drink brands from the region

The growth of global cuisine offerings in the region reflects the increasingly multinational population, with retail offerings across the region bringing flavours of Asia, Europe, Africa and South America to the region, from Halal meats, to Asian spices and specialist ingredients, to Eastern European staples.



The positive impact of this diversity on the regional food scene can also be seen in the hospitality offering in the region, with award-winning Thai and Indian cuisine, joining Chinese, Japanese, Brazilian, Lebanese and more, as well as European bakeries and restaurants with French, Portuguese and Italian influences, and an increasing number of regional food and drink producers offering globally-influenced products. Some of the well-known hospitality businesses and brands in the region include those featured in the table below, representing just a snapshot of the talent in the region.



GLASSON  
LAKEHOUSE



Table 2: A sample of well-known hospitality businesses in the region





# Population and Demographics





# Population and Demographics

**In December 2023, Ireland witnessed a seasonally adjusted unemployment rate rise to 4.9%, signalling a perceptible cooling of the labour market amid a continued decline in job postings.**

This marks an increase from the 4.8% recorded in November and maintains a consistent upward trend observed since April. Although the rate remains historically low, the country's total number of unemployed individuals reached 136,300 in December 2023, reflecting a rise of 1,700 individuals compared to November.

In a year-on-year comparison with December 2022, where the unemployment rate stood at 4.3%, there was an increase of 19,200 unemployed individuals. Further breakdowns reveal that the seasonally adjusted unemployment rate rose to 5.1% for males, up from 5.0% in November 2023 and 4.3% in December 2022.

The rate for females remained unchanged at 4.6% in December 2023, compared to November 2023, and increased from 4.5% in December 2022. Notably, the youth unemployment rate for individuals aged 15-24 increased to 13.4% in December 2023, up from 13.0% in November 2023.

## Midlands Population

According to the 2022 census, the Midlands region has a population of 317,999. This is an increase of 7%, or 18,737 since 2016 (Midlands 103, 2023). This breaks down as Westmeath 96,221, Laois 91,877, Offaly 83,150, Longford 46,751. Longford, the second least populated county in the State, recorded the biggest percentage increase of 14.1 per cent between 2016 and 2022 according to new figures.



Figure 4: Center Parcs, Co. Longford

The regional population increase was made up primarily by inward migration, both from within and outside of the State. Migration made up an estimate increase of 14,213. Natural population increase was recorded at 11,485. Population breaks down as 159,076 males and 158,923 females.

## International Migration

It is important at this juncture to also recognise the scale of international migration to the Midlands region. From the CSO it is possible to identify the regional population by citizenship. While this can become a relatively complicated topic, it is clear that there is now a significant proportion of the Midlands population who have citizenship outside Ireland. This may bring opportunities for new skills in the region, and also may present opportunities for new soft skill development in relation to cultural integration in the workplace.

	Irish and Dual Irish Citizenship	Non-Irish Citizenship	Total
Longford	36,663	9,710 (26%)	46,373
Laois	79,182	12,102 (15%)	91,284
Offaly	73,077	9,490 (13%)	82,567
Westmeath	81,527	13,944 (17%)	95,471

Table 3: Non-Irish citizenship in the region

There are a large number of recent temporary protection citizens from Ukraine working in the Midlands, which has steadily increased since statistics were first released by the CSO for June 2022. The arrival of large numbers of people from Ukraine to the Midlands presents an opportunity for employers to recruit new staff.

	June 2022	March 2023	January 2024
Longford	29	132	287
Laois	31	116	198
Offaly	54	166	394
Westmeath	88	397	734
<b>Total</b>	<b>202</b>	<b>811</b>	<b>1,613</b>

Table 4: Employments and employees among arrivals from Ukraine <https://data.cso.ie>

## Employment Statistics

According to the CSO, Ireland had a national unemployment rate of 4.2% in 2020. 3.3% of the population age 15-24 were classified as long term unemployed. 7.3% of the national population age 15-24 were looking for their first regular job. Comparatively these figures were marginally higher in the Midlands across all areas, with the following rates:

	Unemployment Rate	Age 15-24	Looking for First Regular Job – Unemployment Rate
Longford	5.3%	5%	10.4%
Laois	4.5%	3.7%	8.5%
Offaly	4.8%	4%	8.4%
Westmeath	5%	4.2%	8.9%

Table 5: Regional Unemployment Statistics <https://data.cso.ie/table/QLF08>



There appears based on these statistics to be an opportunity to target those age 15-24 in the region with job opportunities in the food industry. Despite the comparatively higher figures, the latest census from 2022 shows over 17,000 more people were working in the region, when compared to the survey in 2016.

### Education Provision in the Region

CSO and other relevant data points towards some educational disadvantages in the region. This includes both at primary school and post-primary level, where there are a large number of schools receiving additional supports. DEIS stands for Delivering Equality of Opportunity in Schools and is a national programme which began in September 2006. More than 240,000 students in 1,200 schools are supported in DEIS across the country. Through DEIS, the Government gives extra resources to schools where more support is needed. Schools do not apply for DEIS status but are categorised based on national census data. There are 50 DEIS schools in the region, including 27 in Primary Urban Band 1, 8 in Urban Band 2 and 15 Post-Primary Schools (see Appendix Four).

The region does not compare favourably to the national average in terms of completion of higher education. The national average for completion of higher education for the population above age 15 is 45%. Longford males, for example, at 30.5% higher education completion rate, have the lowest completion rate of a gender in any county nationally, while Co. Offaly males, at 33.8% are the fourth lowest nationally. The highest rate in the country is Dún Laoghaire-Rathdown males at 66.7%. This poses challenges in terms of roles in the region which would likely require degree level qualification, such as accountancy, food science, and senior leadership roles.

Location	Gender	Percentage Completing Higher Education Age 15+
State	Male	43
State	Female	46.7
Laois	Male	35.6
Laois	Female	43.1
Longford	Male	30.5
Longford	Female	37.8
Offaly	Male	33.8
Offaly	Female	40
Westmeath	Male	39.4
Westmeath	Female	44

Table 6: Higher Education Completion Rates in Midlands

### Remote Working

It is important also to note the increase in the numbers of people working from home in the region. The 2016 census recorded a population across the four counties of 6,597 people who mainly work at home. By 2022 this figure had increased to 11,581, an increase of 75%. In the past, citizens did not have a legal right to ask for remote working but this changed in 2023 under the Work Life Balance and Miscellaneous Provisions Act 2023 (Citizens Information, 2024). Commercial property group BNP Paribas Real Estate Ireland reported that in 2019 only 7 per cent of Ireland’s workers “usually” worked from home but this has now increased to 25% (2022), the biggest percentage point increase of any EU country (Colin Gleeson, 2023).

While remote working presents some opportunities for the food industry – e.g. facilitating back office workers to work from home – it also presents challenges given the requirements for general operatives and those involved with food production to be present on site. Remote working opportunities in other sectors may make food industry roles somewhat less attractive as a result.



## Regional Considerations



# Regional Considerations

**This section introduces some of the key socio-economic and environmental features of the Midlands region which are worth noting in the context of skills attraction, development, and retention. Bord na Móna and Just Transition, physical geographies, transport links and infrastructure are highlighted below.**

## Bord na Móna and Just Transition

Established in 1946 as a semi-state agency, Bord na Móna played a vital role in the socioeconomic development of the Midlands. Since its establishment, the company stood both as a major employer, but also as a transformative force, impacting the Midlands' physical landscapes, transforming itself from 'just a peat' company, which has lasted over eight decades, to a climate solutions company, focussed on renewable energy generation, recycling, peatland rehabilitation and sustainable product development. Today, Bord na Móna employs approximately 1,500 people while managing a land holding of over 80,000 hectares. Some of the land previously used for peat harvesting has been rewilded into a nature reserve and amenity park at Lough Boora Discovery Park (Home - Lough Boora Discovery Park, n.d.).

The evolution of Bord na Mona and the associated European Just Transition Fund have relevance for food and drink skills needs in the region, given the opportunities presented by new initiatives, funding availability, support and training for SMEs and plans to vary and improve land use, restoring biodiversity. €169 million was committed for a just climate transition in Ireland as a part of the European Union's broader efforts to ensure that the transition to a greener, more sustainable economy is fair and inclusive. 'The restoration and repurposing of 12,500 hectares of land to regenerate biodiversity and the reduction of greenhouse gas emissions from degraded land will also be the focus of the funding.' (European Commission, 2023b).



Figure 5: Lough Boora Discovery Park, Fáilte Ireland Content Portal



Figure 6: Just Transition Graphic, European Commission

This fund is specifically designed to support regions that are more economically dependent on industries that may be affected by the transition toward a low-carbon and environmentally friendly economy. In the context of the Midlands region of Ireland, which has traditionally been associated with peat extraction and power generation, the Just Transition Fund becomes particularly relevant.

### Some key aspects of the Just Transition Fund include:

#### 1. Industry Transformation:

The Midlands has historically been a significant region for peat extraction and the generation of electricity from peat. Given the EU's commitment to reducing greenhouse gas emissions and transitioning to renewable energy sources, there is a need to transform or phase out certain industries. The Just Transition Fund provides financial support to assist regions like the Midlands in this transition.

#### 2. Worker Support:

The focus of the Just Transition Fund is to support workers affected by the transition. This includes measures for retraining, reskilling, and upskilling workers to help them transition to new industries or sectors. The goal is to minimise job losses and ensure that the workforce is adequately equipped for the evolving job market.

#### 3. Community Development:

The Just Transition initiative recognises the importance of supporting communities in the Midlands. This involves investments in local infrastructure, economic diversification, and community projects to mitigate the potential negative impacts of the transition on the quality of life in the region.

#### 4. Environmental Restoration:

The transition in the Midlands is not only about economic changes but also about environmental sustainability. The Just Transition Fund may support initiatives related to environmental restoration, biodiversity conservation, and the development of sustainable land-use practices in the region.

#### 5. Stakeholder Engagement:

The Just Transition process involves active engagement with various stakeholders, including local communities, businesses, and workers. Ensuring that the voices and concerns of these groups are considered is a fundamental aspect of the just transition approach.



## Physical Geography of the Midlands

The Midlands are dominated by a number of prominent geographical features which are worth noting in the context of food production. These include the Slieve Bloom Mountains, the River Shannon, lowland bogs, eskers, lakes, and some Coillte managed and native forests. The physical geography of the region was surprisingly mentioned infrequently in the interviewees or as prominently as they might in the secondary materials related to food. It would seem evident that the regions which succeed with food branding utilise their physical geographies visually and repeatedly in marketing materials, drawing on the connections between food and place. These locations offer marketing opportunities to promote activities relating to food production and food tourism, such as agricultural tourism, foraging and seasonal foods and fishing.



Figure 7: Midlands Region of Ireland ("Regions of Ireland: The Midlands," n.d.)

Transport links in the region include the M6 motorway which serves as a major arterial route, connecting the Midlands to both Dublin and Galway, facilitating good travel connections for food production and supply chains. Additionally, the M7 motorway intersects the region, providing a direct link to Limerick and Cork, with the M4 bringing connectivity to the North West. The extensive road network is complemented by a good rail infrastructure, with key railway stations in Portlaoise, Longford, Athlone, Mullingar and Tullamore connecting the Midlands to major urban centres. The strategic location of the Midlands positions it as a vital transportation hub, enhancing connectivity for businesses and residents alike. Overall, the well-developed transport links in the Midlands contribute significantly to the region's economic development, accessibility, and connectivity within Ireland.

With relation to skills attraction, retention and development, there may be opportunities to focus more of the marketing skills in the region on promotion of the connection between food and place, to both enhance the attractiveness of the region to visit, but also as a place to live.



Figure 8: Midlands Region of Ireland ("Regions of Ireland: The Midlands," n.d.)







# Policy Context – Europe



# Policy Context – Europe

**According to the 2023 FoodDrinkEurope report, the food and drink sector remains an integral part of the European economy, employing 4.6 million individuals and contributing substantially to the EU economy with a turnover of €1.1 trillion.**

Interestingly, the sector is the leading manufacturing employer in half of the EU's 27 Member States. The same report suggests that approximately 60% of EU food and drink exports are directed to the Single Market while maintaining its status as the world's leading exporter of food and drink products, ahead of the US and China, which accounts for €182 billion in exports outside the EU with a trade surplus of €73 billion. In particular, both intra-extra EU exports demonstrated an average annual increase of 7% and 6% per year, marking the 12th consecutive year of growth for the European food and drink industry. Despite Brexit, the report indicates that the UK ranks first in the export market, leaving behind the US and China (FoodDrinkEurope, 2023).

## European Green Deal

The European Green Deal is a comprehensive set of policy initiatives and strategies outlined by the European Union (EU) to address environmental challenges and promote sustainable development (Consilium, 2021). It was introduced in December 2019 as a key component of the EU's efforts to become the world's first climate-neutral continent by 2050.

The main goals of the European Green Deal include:

- **Climate Neutrality:** Achieving net-zero greenhouse gas emissions by 2050 to combat climate change.
- **Clean Energy:** Transitioning to a more sustainable and circular economy, with a focus on renewable energy sources and increased energy efficiency.
- **Sustainable Mobility:** Promoting cleaner and smarter transportation, including the expansion of electric vehicles and improved public transportation.
- **Biodiversity:** Protecting and restoring ecosystems, with an emphasis on halting biodiversity loss and promoting sustainable agriculture.
- **Zero Pollution:** Reducing pollution and promoting a toxic-free environment by addressing air and water quality, waste management, and the use of hazardous chemicals.
- **Circular Economy:** Encouraging the reuse, recycling, and reduction of waste to create a more circular and sustainable economic model.
- **Farm to Fork Strategy:** Ensuring a more sustainable and resilient food system, with a focus on promoting healthy and environmentally friendly agricultural practices.
- **Just Transition:** Ensuring a fair and inclusive transition for all regions and sectors affected by the shift towards a green economy, with a focus on job creation and social equity.

There are specific metrics in the deal which will impact on food and drink production, tourism, housing, and enterprise in the Midlands. These include:

1. **Greenhouse Gas Emissions Reduction Targets:** The primary metric is achieving climate neutrality by 2050, which involves reducing greenhouse gas emissions to net-zero levels. Intermediate targets for emission reductions by specific years are also outlined. Ireland's Climate Action Plan 2021 provided a detailed strategy for taking decisive action to achieve a 51% reduction in overall greenhouse gas emissions by 2030
2. **Renewable Energy Deployment:** Metrics related to the share of renewable energy in the total energy mix, with specific targets for increasing the use of renewable sources such as wind, solar, and hydropower. This has become very evident in the Midlands region with significant increases in onshore windfarms. E.g. at Derrinlough and Mount Lucas.
3. **Energy Efficiency:** Targets for improving energy efficiency in various sectors, including buildings, industry, and transportation. This involves reducing energy consumption and promoting energy-saving measures.
4. **Circular Economy Metrics:** Measures related to waste reduction, recycling rates, and promoting circular practices in production and consumption to minimise resource use and waste generation.
5. **Biodiversity Conservation:** Metrics focusing on halting the loss of biodiversity, protecting and restoring ecosystems, and promoting sustainable agricultural practices that support biodiversity.
6. **Air and Water Quality:** Metrics related to reducing air and water pollution, ensuring compliance with environmental quality standards, and improving overall environmental health.
7. **Sustainable Mobility Metrics:** Targets for increasing the share of electric vehicles, improving public transportation, and promoting sustainable and low-emission mobility solutions.
8. **Farm to Fork Metrics:** Indicators related to promoting sustainable food production, reducing the use of pesticides and fertilizers, and ensuring a more resilient and environmentally friendly agricultural sector.
9. **Just Transition Indicators:** Metrics to assess the social and economic impact of the transition to a green economy, including job creation, social inclusion, and support for regions and sectors affected by the transition.
10. **Investment and Funding Metrics:** Tracking financial commitments and investments made by the EU and its member states to support the implementation of the European Green Deal.



## The Common Agricultural Policy

The Common Agricultural Policy (CAP) is a policy framework established by the European Union (EU) to support and regulate agricultural activities within its member states (European Commission, 2023a). The CAP has undergone multiple reforms since its inception, and its primary objectives include:

- 1. Income Support:**  
Providing financial support to farmers to stabilise their incomes and ensure a fair standard of living.
- 2. Market Regulation:**  
Implementing measures to balance the agricultural market, prevent overproduction, and stabilise prices for agricultural products.
- 3. Rural Development:**  
Investing in rural areas to promote economic development, improve living conditions, and enhance the overall quality of life in rural communities.

The CAP is typically structured into two pillars:

- 1. First Pillar (Direct Payments):**  
This pillar involves providing direct financial support to farmers through various schemes such as the Single Payment Scheme (now replaced by the Basic Payment Scheme) and the greening payment. These payments are linked to the amount of land a farmer cultivates.
- 2. Second Pillar (Rural Development):**  
This pillar focuses on broader rural development initiatives, including agri-environmental programs, investments in infrastructure, and measures to promote sustainable farming practices.

Key features and aspects of the Common Agricultural Policy include its role in ensuring food security, environmental sustainability, and the overall competitiveness of the EU's agricultural sector. The CAP undergoes periodic reforms to adapt to evolving agricultural challenges, market dynamics, and policy goals. The CAP has implications for the region, including income support for farmers, rural development initiatives, climate change mitigation and specific environmental change issues, such as transitioning away from peat burning in the region.

While the Midland region may generally be perceived as being a strong agricultural region, it was the second smallest agricultural producing region in 2022, generating 10% of the State's output. It created 12% of the total value of Irish Livestock and 9% of Irish Milk. It was the third largest Pig producer, generating 18% of national output. The region was the smallest producer of Crops, growing 9% of the State's total. (Central Statistics Office, 2024).

### Short Case Study 1: Alentejo, Portugal: Labour Shortages & Migrant Workers

#### Background:

The Alentejo region in Portugal is known for a rich agricultural heritage, with traditional wine production. Like the Midlands it has faced challenges in attracting and retaining talent in the food and drink production sector. The region, historically characterised by rural depopulation and limited economic opportunities has sought to revitalise its labour market by focusing on sustainable agribusiness development. Alentejo cuisine is quite unique in Portugal – it is influenced by Mediterranean climate and Roman and Moorish heritage. Olive oil, stews, meats, and fish play significant role in this food culture.

Challenges faced by the region include a rapid agricultural intensification, dry summers, EU subsidy dependency issues, issues with fertilisers, pesticides and increased water needs. There are major challenges with undocumented farm migrant labour from Asia and other continents in Alentejo, due to outbound migration and an ageing population. It is one of the least populated regions in Europe.

Despite the environmental challenges the promotion of the region's unique selling points has clearly yielded results as the popularity of the region for food tourism has grown (*Gastronomy and Local Development: The Quality of Products, Places and ... - Google Books, n.d.*). These promotions have highlighted the region's cultural richness, natural beauty, and unique agricultural practices to attract individuals seeking a high quality of life. There is a clear highlighting of the olive oil and wine production in the region on the marketing material. The importation of labour, although with many outstanding issues around rights and ethics to be addressed, would appear to be the method adopted by producers in the region to overcome staffing challenges (*Cheap Asian Workers Flock to Portugal's Farms - DW - 06/08/2021, n.d.*). *Immigrant Slavery in Alentejo Has No End in Sight - Portugal Resident, n.d.*; *Migrant Fruit Pickers Face Exploitation in Portugal - InfoMigrants, n.d.*)

The region's restaurants sell a very diverse range of dishes, from fish soups, açordas, migas (a bread-based puree) with pork, gazpacho, lamb stew, hunting dishes and conventional desserts. One lesson for the Midlands from this case study, could be that 'there is no need to seek haute-cuisine restaurants', as according to Visit Alentejo, (*Cuisine - Culture - Alentejo - Turismo Do Alentejo, n.d.*) the focus on authenticity wins out. The food for which the region is famed is very simple, rustic, traditional – e.g. 'fresh bread dipped

in olive oil, sometimes flavoured with a drop of vinegar and a pinch of sea salt'. There is no reason why the simplicity of offering in the Midlands where we have simple but excellent home-grown produce cannot be utilised effectively to improve our reputation. The best meals are to be found where 'locals will treat you like family'.

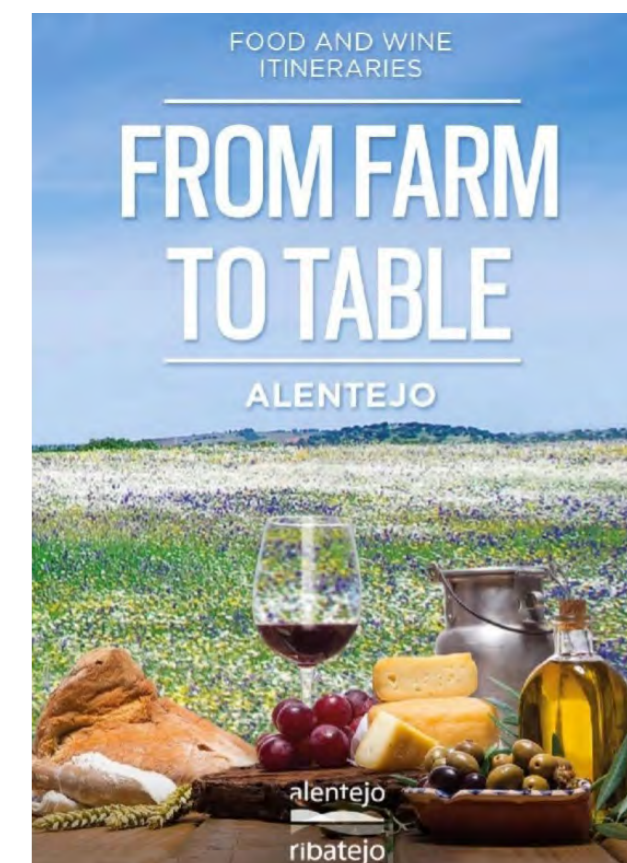


Figure 9: From Farm to Table. Alentejo Food and Wine Itineraries, available at [https://issuu.com/caminhodaspalavras/docs/alentejo\\_en#google\\_vignette](https://issuu.com/caminhodaspalavras/docs/alentejo_en#google_vignette)



## Short Case Study 2: FOODTURISTIC: An Erasmus Key Action 2 Project

There are also European funded projects related to food currently being undertaken in the region. One example is the FoodTuristic project, led by the Technological University of the Shannon. This project addresses the lack of green technology curriculum in European culinary and hospitality schools, which primarily focus on gastronomy and hospitality management skills. The project aims to develop digital resources for educators and students in hotel and culinary schools across four partner countries to reduce food waste, develop circular economy skills, and localise food production. The project will develop a vocational education and training course, a website, a mobile app, and a good practice guide to address the green skills gap in European culinary and hospitality schools. The project aims to reduce food waste, utilise food waste in novel technology composting systems, and utilise new technologies to grow appropriate foods onsite. The skills developed by project output users will have strong legacy potential and benefit the reduced carbon impact of schools and industry.

Partners on the project include The Vocational Hospitality and Tourism School (Maribor, Slovenia), Lycée Hotelier De Dinard (Brittany, France), Munster Technological University (Cork) and The Institute of Tourism Studies (Malta).

A sample of Items identified by the project suitable for SME usage include:

- **The Auk:**  
An indoor growing system, suitable for a small windowsill herb garden. This allows for growing quantities of otherwise expensive flavouring and decorative items.

- **MyGUG:**  
An Irish food composting and methane harvesting system suitable for home, café and large scale operations. This turns food waste into a more valuable resource.
- **Shrooly:**  
A smart indoor system for growing exotic mushrooms. This has the potential to grow novel foods and reduce food miles.
- **Shelfy:**  
An ethylene filter with smart capabilities for use in a refrigerator. This system improves the lifespan of fruit and vegetables by slowing down the ripening process.
- **Positive Carbon:**  
This is an AI camera integrated food waste bin which identifies and weighs food waste giving the chef live reports on what items are being discarded.
- **TooGoodToGo:**  
A cloud-based platform and mobile app allowing retailers to sell fresh food that is close to use by date for discounted prices.



Figure 10: FoodTuristic Logo

## Short Case Study 3: 50 Trends Influencing Europe's Food Sector by 2035

A very useful document for the study was a Horizon Europe report on 50 trends influencing Europe's food sector by 2035. This report (FOX, 2022) was published by a consortium of European universities and is described as: *'a unique collaboration between universities, research institutions, small to medium enterprises, industries and associations, who are extremely grateful for the financial support of seven million Euro from the European Commission's Horizon 2020 Research and Innovation programme. The project lasts for 4,5 years (2019-2023).'*

(FOX, 2022)

The 50 trends are presented on the next page, and while it is impractical in this current audit to analyse all of them, a selection of the trends is expanded on, with notes on potential relevance for the Midlands region. The expanded trends are highlighted in the table in bold and include Local Food Circles, Food Losses and Waste, and Sustainable Food for All.

**Local Food Circles** are described in the report as promoting:

*'the consumption of safe, regionally grown food that encourages sustainable agriculture practices and helps maintain farmers and rural areas. The circular practice relies on spatial proximity and ideological parity of actors across all production, consumption and waste management activities. A functioning food circle accounts for material, geographical, sociocultural, and political dimensions. Advantages include better traceability and freshness of products, reduced packaging, improved relationships between farmers and*

*consumers, and decreased environmental damage from agriculture and logistics.'*

(Brochure: 50 Trends Influencing Europe's Food Sector by 2035 - FOX, n.d., P19)

Strengthening local food circles in the Midlands region would bring a number of benefits, particularly extending out from the towns of Mullingar, Athlone, Longford, Portlaoise and Tullamore. This would include supporting the local economy, promoting sustainability by reducing food miles, preserving local cultures and traditions – particularly those connected to the peatland landscape, building community cohesion and diversifying agricultural produce. In terms of skills needs, it is clear that skills are needed to establish these food circles, including sales, marketing and promotion, negotiation, and community development.

**Food Losses and Waste** is defined in the 50 Trends Influencing Europe's Food Sector report as:

*'Globally, around one third of all food produced is lost or wasted in production, post-harvest, processing, retailing or consumer handling. Consumers in industrialised countries throw away around ten times more food than in developing countries. In a world where millions of people are starving, this is a strong indication of the inefficiency of current food systems. www.isi.fraunhofer.de Food losses and waste often lead to economic losses for farmers and other actors in the food value chain, as well as to higher prices for consumers. Both have an impact on food insecurity by making it more difficult for vulnerable groups to access food. Reducing food losses and waste would increase the supply of available food and strengthen global food security.'*

(FOX, 2022)



This point has particular relevance in the Midlands given the MREP strategy's focus on sustainability. It will not be enough for success in the region to promote sustainability, but both technical and soft skills will be needed to support this. These skills will include technological readiness and innovation (e.g. in advanced manufacturing and automation), materials science, circular economy and new product development.

For example, the company BiaSol, based in the Midlands, repurpose a waste food product, and have found success through retail channels and national features from the Independent and RTE, among others. This product innovation will be critical to enhancing the sustainability reputation of the Midlands.

***“Our highly nutritious foods are made from repurposed leftover grains collected from Irish Breweries. It’s a simple proposition - good for you, good for our planet.”***

(BiaSol, 2024)

Thirdly, **Sustainable food for all**, is defined in the report as:

***“With the rising global population, food availability is an important need and an important challenge. A sustainable food system is fundamental in solving many of the global issues, such as climate change, land use, biodiversity and mass migration. Another development that needs to be highlighted in this context is the double burden of famine and obesity: While undernutrition in developing countries is still a huge problem, particularly in Sub-Saharan Africa and South Asia, malnutrition caused by unhealthy diets is becoming an increasingly serious problem today. This development not only applies to high-developed countries but also among the poorest populations.”***

While Ireland and the Midlands are wealthy regions by comparison to the locations discussed in the report, Ireland still faces many underlying structural difficulties in society, which have impacts on health, diet, nutrition. For example, childhood poverty remains a critical issue in Ireland. For example, Social Justice Ireland, write that in 2022 around 190,000 children (1 in every 7 children in Ireland) lived in households that were experiencing poverty. (Social Justice Ireland, 2023). Skills issues associated with this issue in the Midlands, including tackling regional deprivation, the high percentage of DEIS schools (appendix 4) and urban decline, food science skills and healthy eating education programmes.

1-10	11-20	21-30	31-40	41-50
New nutrition pattern	Increased market power of retailers	Do-it-yourself as competition to industrial production	Scandalization of food waste	Conflicts, crises and natural disasters
Functional food	Changing legal framework for retailers	Sharing instead of owning	<b>Food losses and waste</b>	Decline of biodiversity
Vooking – vegan – gluten free	Digitalization of trade	Sufficiency society	Stricter waste regulations	Label accuracy and transparency
Increased flexibility of consumption	Diversification of business models and marketing	Slow life movement and Downshifting	New ways of food storage	Agricultural productivity and innovation
Customization of products	Blockchain and smart contracts	Civilization diseases on the rise	Climate change	New forms of food production
Presentation of goods for specific purchasing types	<b>Local food circles</b>	Urbanization	Hidden environmental impact of consumption	3D printing of food
Products and service bundles	Changing food systems	Competition for land in urban agglomerations	<b>Sustainable food for all</b>	Automated indoor farming
Products for single households	Increased requirement for transparency of supply chain	Resource utilization	Edible packaging of food	Precision farming
Consumption in upheaval	Sustainable production and value chains	Consumption-related resource usage	Food safety	Remote interaction with people and machines
Peer to peer-based consumption decisions	Convergence of the food and health markets	Re-use of food	Transboundary pests and diseases	Artificial intelligence and machine learning

Table 7: 50 Trends Influencing Europe's Food Sector by 2035



# Policy Context – Ireland





# Policy Context – Ireland

**According to a report published by Bord Bia for 2022–2023, Irish food, drink, and horticulture exports reached €16.7 billion, a record-breaking 22% increase.**

This substantial growth, exceeding pre-pandemic levels by almost 30%, can be attributed to elevated unit prices fuelled by inflation and escalating input costs. The volume of exported goods also played a pivotal role in this surge. Notably, prepared consumer foods, encompassing value-added meat and seafood exports, demonstrated a striking performance, surpassing the €1 billion mark in 2022, marking a 30% increase from the previous year and surpassing pre-Covid-19 levels by 23% (Bord Bia, 2023).

The dairy sector emerged as a significant contributor to Ireland's export prowess, with dairy exports valued at €6.8 billion in 2022, reflecting a substantial year-on-year increase of 33%. The success of Irish butter and cheese in the international market predominantly drove this surge. Meat and livestock exports, totalling over €4 billion, registered a commendable 15% value increase compared to 2021. The prepared consumer food category, boosted by the reopening of food service post-Covid-19 restrictions, exceeded €3 billion. The beverage sector, a noteworthy component of Ireland's export landscape, achieved a milestone as drink exports approached €2bn, a 25% increase from pre-pandemic. Irish whiskey exports, contributing significantly to this growth, reached almost €1 billion for the first time. These figures underscore the diverse nature of Ireland's food and drink portfolio.

In terms of market destinations, the report reveals a nuanced landscape. In value terms, more than one-third of Ireland's total food and drink exports found their way to international markets outside the EU and UK. The EU and UK remained pivotal, constituting 34% and 32% of the export share, respectively.

The UK maintained its status as the largest single-country market, witnessing a 20% increase in exports valued at €5.4 billion in 2022. Noteworthy expansions were observed in exports to the US, surging by almost 40% to over €2 billion, while Asia experienced a 9% increase, reaching €1.5 billion. Despite challenges posed by COVID-19 restrictions in China, the overall global performance underscores Ireland's resilience and adaptability in the evolving dynamics of the international food and drink market.

## Brexit

Brexit brought many uncertainties as well as opportunities for Irish food and drink manufacturers. Brexit has posed multiple challenges to the agri-food sector in the region, with initial concerns around tariffs, free movement of goods, exchange rate volatility, and adherence to new standards. However, negotiations mainly mitigated the associated risks:

- **Support from Local Enterprise Offices, often targeting specific issues**
- **Customs Readiness programme provided by Bord Bia**
- **Clear Customs' training provided by Skillnet Ireland**
- **€9,000 'Ready for Customs Grant' for each employee managing customs clearance**
- **€5,000 'Be Prepared Grant' to fund relevant consulting to develop a Brexit response**
- **Act on Initiative' tailored consulting support**
- **'Agile Innovation Funding' up to 50% towards €300k innovation projects**

- **Bord Bia's Food and Drink Brexit Action Plan**
- **Strategic Consultancy Grants**
- **Market Discovery Funds**
- **Brexit Mentoring**
- **Trading online voucher**
- **Financial Assistance and Micro Finance Loans**
- **Bord Bia's Brexit and Market Diversification webinar series**

## COVID-19

The Midlands region was also impacted by the pandemic, like the rest of Ireland, leading to the closure of the food service sector, which started in March 2020. Hundreds of thousands of hospitality industry workers were jobless overnight across Ireland, creating uncertainty over their future employment and income. The Food Service report published by Bord Bia in 2020 shows that the all-island food service industry declined by 47 percent or €4.5 billion compared to 2019. Although online food shopping doubled during the first lockdown, many small, local manufacturers did not benefit from the growth as they were not available in the supermarket's online list. Additionally, the absence of significant events, such as the Tullamore Show, Ploughing Championships, Electric Picnic, and Fleadh Cheoil, greatly impacted smaller, local, and regional producers. Perhaps the key lessons from the pandemic were the change in Irish consumers' perceptions from out-of-home consumption to take-home groceries and cooking at home. Another was less digitalisation of Irish food service businesses (MidlandsIreland.ie, 2020).

## Fáilte Ireland, National Tourism Development Authority: Food and Drink Strategy 2018–2023

Fáilte Ireland, the National Tourism Development Authority, has been instrumental in advancing Ireland's culinary landscape through its Food and Drink Strategy 2018-2023. Despite Ireland's global image as a nation characterised by friendly people, lush landscapes, and natural purity, the preconceived notions about Irish cuisine arguably do not align with the current reality. Fáilte Ireland's visitor survey revealed that, before visiting, tourists have not always perceived Ireland as a food destination and held low expectations. However, post-visit, they praised the quality of Irish food while expressing a desire for a more extensive variety, particularly noting the lack of focus on fish. Fáilte Ireland's previous Food Strategy (2014-2016) successfully shifted perceptions from Ireland being a producer of great ingredients to a nation boasting an authentic cuisine, with increased innovation and networking among Irish operators.



Figure 11: Fáilte Ireland logo

Food and beverage consumption contribute significantly to Ireland's international tourism revenues, accounting for 35% (EUR 2 billion in 2017). WFTA's World Food Travel Monitor indicates a high satisfaction rate among holidaymakers, reaching 77%, and escalating to 83% for those motivated by food and drink experiences in their destination selection.



Ireland's appeal as a tourist destination is attributed to its natural beauty, green credentials, vibrant culture, warm hospitality, and a wholesome food and drink offering. Fáilte Ireland's strategic branding contributes to this allure, including the Wild Atlantic Way, Ireland's Ancient East, Dublin: A Breath of Fresh Air, and Ireland's Hidden Heartlands.

While there are some premium brands in the Midlands region - notably Tullamore DEW, as a globally recognised whiskey brand, Glenisk, Mossfield Cheese, Kilbeggan Whiskey and First Ireland Spirits – at a national level, the report identifies several weaknesses and challenges. Weaknesses include poor knowledge about Ireland's food heritage, inadequate articulation of Ireland's culinary story, subpar food offerings at some high-density tourist sites and certain accommodations, and a lack of or weak food offerings in some Irish pubs. Challenges encompass general apathy towards the commercial benefits of high-quality and local food experiences, insufficient knowledge among frontline staff, poor staff retention, limited digital tool utilisation, and Brexit-related uncertainties.

Ireland's strengths lie in its reputation for hospitality, 'green' credentials, fresh produce, diverse culinary offerings, and a myriad of distilleries and breweries. Despite improvements in the perception of Irish food, ongoing efforts are needed further to enhance the culinary landscape in the years ahead.

### **Midlands Regional Food and Drink Strategy 2021–2024**

The Midlands Regional and Drink Strategy stemmed from a recognised need to develop a sustainable and resilient food and drink ecosystem in the Midlands Region, encompassing Laois, Longford, Offaly, and Westmeath. The primary objective is to forge a distinctive food and drink ecosystem, fostering local pride in produce, enabling companies to deliver

world-class hospitality and product experiences, facilitating scaling and exporting endeavours, all while upholding a commitment to environmental sustainability.

The Midlands Region, boasting a strategic central location, witnessed a notable upswing in employment pre-COVID-19, registering a growth of 26,100 individuals in employment from Q1 2015 to Q3 2020. Positioned amidst a vibrant third-level sector, including the Technological University of the Shannon – Midlands Midwest (and with SETU, ATU and Dublin based campuses in close proximity), the region exhibits considerable economic activity in the extended food industry. Acknowledging the imperative to transition to a carbon-neutral economy, the strategy underscores the pivotal role the food industry must play, aligning with initiatives like the European Green Deal, Farm to Fork Strategy, and Foodwise 2025.

The Midlands has cultivated a distinctive food and drink culture, with global successes such as Tullamore DEW, First Ireland Spirits, and Kilbeggan Distillery, complemented by numerous gin and craft beer producers. Despite this, consumer research reveals a relatively low awareness of the region's culinary identity among natives. Efforts are needed to create stronger regional associations in the minds of both locals and visitors.

Agri-food contributes significantly to Ireland's GDP, the Midlands commands a modest market share, constituting 3% of tourism visits and 2% of tourism spend. Leveraging an emerging food and drink culture presents a significant opportunity to enhance the region's share of tourism visits, dwell time, and spending.

### **Food Tourism in the Midlands**

The following major events and tourist destinations in Midland attract significant number of visitors each year from the outside region benefiting local producers and businesses:

- **Tullamore Show**
- **Electric Picnic**
- **Ploughing Championship**
- **Center Parcs**
- **Fleadh Cheoil na hÉireann**
- **Food and Drink Festivals**
- **Emo Forest Festival**
- **Weekly Food Markets**
- **Seasonal Markets**

For instance, Fleadh Cheoil na hÉireann has attracted 600,000 visitors in 2023 to Mullingar ('Fleadh Can Be Basis to Build Truly Compelling Visitor Destination' | Westmeath Examiner, n.d.), while the National Ploughing Championships in Ratheniska, Co. Laois attracted 300,000 in 2023. (National Ploughing Championship | Kilkenny Hotels | Kilkenny Ormonde Hotel, n.d.). These large-scale events offer excellent opportunities for promoting the food culture of the region.



# Overview of the Food and Drink Industry Supports in the Midlands





# Overview of the Food and Drink Industry Supports in the Midlands

**The Midlands has a younger demographic than the national average with almost 50% of people under 35 years of age, an expanding network of Innovation, Technology and Co-Working Hubs distributed throughout the region plus emerging Research clusters in Life Sciences, Technology, Engineering, Advanced Manufacturing, Robotics, and Low Carbon/Green Enterprise.**

With lower childcare costs, rents and property prices distributed throughout the four counties, living is significantly more affordable than in much of the surrounding country, and particularly when compared to key coastal cities. With a household gross income in line with the national average, prospective buyers have more purchasing power here than in other major counties. The Midlands Innovation and Research Centre (MIRC) in Athlone and MaynoothWorks in Maynooth jointly deliver the New Frontiers programme in the Midlands Mid-East region. This partnership between Technological University of the Shannon and Maynooth University means that New Frontiers participants have access to the expertise, facilities and resources of both locations. Supports related to packaging are also available through the Applied Polymer Technology Gateway in TUS.

*“The MIRC provides incubation facilities and business development support for innovative and knowledge-based startups and makes available the resources and expertise of TUS to support client companies and enterprise in the region. Whether you are a prospective entrepreneur, a start-up, an existing company committed to ongoing innovation or an academic interested in commercialising your research, the MIRC is open to you.”*

(Technological University of the Shannon (TUS) - Athlone Campus | New Frontiers, n.d.)

Local Enterprise Offices (LEOs), operating at county level, often provide support and guidance for small businesses, including those in the food sector. They may offer training, mentoring, and financial assistance. There are a number of food incubator hubs in the region, including existing facilities in Ferbane and Mountmellick, proposed facilities in Lanesborough and a newly opened large-scale facility outside the region in Athenry, the Bia Innovator Campus, which is worth noting. Ferbane Food Campus, located in Co. Offaly, Ireland, serves as a supportive hub for food start-ups. The campus offers advice and benefits to tenants, as highlighted in a video on their website featuring tenant testimonials. The campus provides grant assistance for food producers, subject to eligibility criteria and two time-share kitchens, production/incubation spaces, and office units are available, with customisation options for food-grade facilities and services such as drainage, electricity, and goods inwards access. (Ferbane For Your Food Business – Ferbane Food Campus, n.d.).

The Mountmellick Development Association (MDA) is a non-profit organisation led by a voluntary board of directors aiming to enhance the economic, social, and cultural development of Mountmellick and its surrounding areas. Through LEADER funding from Laois Partnership Company, the MDA has established a modern facility with three kitchens, including a bakery and a training/demonstration kitchen. This state-of-the-art facility serves as a valuable resource for emerging and expanding food companies in the Midlands region, offering cost-effective options for utilising commercial kitchens. The kitchens provide flexible rental options, allowing food entrepreneurs to access facilities without the high costs of constructing their own kitchens. The commercial kitchens are available for daily, weekly, monthly, or long-term leases, catering to the needs of startups and growing businesses.

The facility offers amenities such as changing rooms, wheelchair access, free parking, storage areas, meeting rooms, and toilets.

Lease durations can range from one year or more to hourly/daily rentals, accommodating various customer preferences. Additionally, they extend support to start-up food businesses by offering bookkeeping services and has a crèche on campus for those in need of childcare services. (Mountmellick Development Association | Commercial Kitchens, n.d.).

## SWOT Analysis

The Midlands Regional Food and Drink Strategy for 2021-2024 included a SWOT Analysis highlighting the current positioning of the Midland’s Region food and drink sector.

### Midlands Regional Food and Drink Strategy for 2021-2024 SWOT

#### Strengths

1. Centrally located in the heart of Ireland, the most connected region
2. Access to a young, dynamic and well-educated workforce
3. Well-serviced principal towns of Athlone, Tullamore, Mullingar, Longford, and Portlaoise
4. Recognised as an international event hub through Electric Picnic, Ploughing, Athlone Sports Arena and Tullamore Show
5. Globally renowned drinks brands in Tullamore DEW and Kilbeggan Whiskey with a thriving craft renaissance with Slingshot Gin, Ballykilcavan Beer, and Dead Centre Brewing

#### Weaknesses

1. Large but low-profile food and drink production sector
2. Strong manufacturers but no unique ‘Midlands’ personality
3. Limited social activity throughout towns
4. Start-ups struggling and limited network
5. Variable quality in cafe scene and limited use of locally produced food and drink

#### Opportunities

1. Get the stakeholders aligned to a shared vision
2. Peer to peer networking and knowledge sharing
3. Update and digitise the midlandsireland.ie regional food and drink producer directory
4. Engaging with local schools
5. Develop food trails and visitor experiences
6. Diversifying the small beef farmers and examining transition
7. Partner up with national and local retailers to enhance midland food and drink visibility
8. Develop a network of vibrant farmer’s markets throughout the region
9. Start telling our food and drink stories online and in social media

#### Threats

1. Brexit threats to UK exporters
2. Lack of long-term funding for initiatives
3. Hard to attract and retain talent with a fledgling food eco-system
4. Dispersed population creates lower customer footfall for food and drink businesses
5. Food and drink businesses focusing on their capabilities – rather than understanding their customer needs
6. Supports are not integrated and mapped out



# Food and Drink Education Provision in the Midlands





# Food and Drink Education Provision in the Midlands

An early step in the project involved a desk assessment of course provision in the region specific to food and drink skills. The three largest providers of Further Education and Training (FET) and Higher Education (HE) were chosen for this analysis. These included Longford Westmeath Education and Training Board, Laois Offaly Education and Training Board, and the Technological University of the Shannon's Athlone campus.

A sample of the Further and Higher Education Programmes available in the region relating to food and drink skills is presented in the table below. It is important to note some parameters for the below courses, including:

1. Courses in all institutions run subject to demand;
2. The majority, but not all, are focussed on food and drink service as opposed to food and drink production, of which there are very few courses provided in the region;
3. There is a potentially unlimited list of courses which could be related to food and drink production, including in Science, Engineering and Business disciplines, among others. This list attempts to present a snapshot sample of those in the region.
4. The below are presented as full, or minor awards. This means students can graduate from these courses. Individual modules (for example, a Food Science module within a general science degree) are not captured in this exercise;
5. Courses from the Technological University of the Shannon's Midwest campuses, including Limerick, Ennis, Thurles, LSAD and Clonmel are generally excluded as falling outside the regional remit of the MREP strategy.
6. Some non-regional courses, which are offered in a blended form with majority of online learning are included where directly relevant.

Provider	Course Name	Notes	Course Link for Further Information
Technological University of the Shannon	BSC Hons Nutrition and Health Science	Full time undergraduate BSC Hons	<a href="https://tus.ie/courses/us950/">https://tus.ie/courses/us950/</a> , (TUS, 2024d)
Technological University of the Shannon	Certificate in Culinary Skills	Available part-time via Springboard funding in Athlone	<a href="https://tus.ie/courses/certificate-in-culinary-skills-16-60-ects/">https://tus.ie/courses/certificate-in-culinary-skills-16-60-ects/</a> (TUS, 2024c)
Technological University of the Shannon	Higher Certificate in Culinary Arts	Available both full time and part time in Athlone	<a href="https://tus.ie/courses/us930/">https://tus.ie/courses/us930/</a> (TUS, 2024a)
Technological University of the Shannon	Bachelor of Arts in Culinary Arts	Available both full time and part time in Athlone	<a href="https://tus.ie/courses/us930/">https://tus.ie/courses/us930/</a> (TUS, 2024b)

Provider	Course Name	Notes	Course Link for Further Information
Technological University of the Shannon	Bachelor of Arts (Hons) in Culinary Entrepreneurship	Available both full time and part time in Athlone	<a href="https://tus.ie/courses/us930/">https://tus.ie/courses/us930/</a> (TUS, 2024b)
Technological University of the Shannon	Certificate in Pastry, Baking and Desserts	Short course, available part-time in Athlone	<a href="https://tus.ie/courses/direct-entry-pastry-baking-desserts/">https://tus.ie/courses/direct-entry-pastry-baking-desserts/</a> (TUS, 2024e)
Longford Westmeath ETB	Nutrition	Online (Level 5 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> , (LWETB, 2024)
Longford Westmeath ETB	Catering	In Longford Town (Level 3 & 4 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Longford Westmeath ETB	Food Preparation	In Mullingar (Level 5 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Longford Westmeath ETB	Retail with Barista Training	In Mullingar (Level 4 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Longford Westmeath ETB	Food Hygiene	Online (Level 5 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Longford Westmeath ETB	Nutrition and Healthy Options	Mullingar (Level 3 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Longford Westmeath ETB	Food Preparation - Hospitality Operations	Mullingar (Level 5 QQI)	<a href="https://www.lwetb.ie/fet/#">https://www.lwetb.ie/fet/#</a> (LWETB, 2024)
Laois Offaly ETB	Food Science	Tullamore (Level 5 QQI)	<a href="https://www.loetb.ie/?sfcw-courseid=427285">https://www.loetb.ie/?sfcw-courseid=427285</a> (LOETB, 2024)
Laois Offaly ETB	Food, Beverage & Professional Cookery	Tullamore (VTCT Level 2)	<a href="https://www.loetb.ie/?sfcw-courseid=380889">https://www.loetb.ie/?sfcw-courseid=380889</a> (LOETB, 2024)
Laois Offaly ETB	Applied Science with Laboratory Techniques	Tullamore (Level 5 QQI)	<a href="https://www.loetb.ie/?sfcw-courseid=414395">https://www.loetb.ie/?sfcw-courseid=414395</a> (LOETB, 2024)
Laois Offaly ETB	Applied Science with Nutrition	Tullamore (Level 5 QQI)	<a href="https://www.loetb.ie/?sfcw-courseid=414390">https://www.loetb.ie/?sfcw-courseid=414390</a> (LOETB, 2024)



Provider	Course Name	Notes	Course Link for Further Information
Laois Offaly ETB	Professional Cookery	Tullamore (Level 5 QQI)	<a href="https://www.loetb.ie/?sfcw-courseid=428356">https://www.loetb.ie/?sfcw-courseid=428356</a> (LOETB, 2024)
Laois Offaly ETB	Culinary Arts with Green Hospitality	Training Laois (Level 5 QQI)	<a href="https://www.loetb.ie/?sfcw-courseid=411627">https://www.loetb.ie/?sfcw-courseid=411627</a> (LOETB, 2024)
Laois Offaly ETB	LEAN White Belt	- 1 Day	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	LEAN Yellow Belt	- 2 Day	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	LEAN Green Belt	- 5 Day	<a href="https://www.loetb.ie/?sfcw-courseid=429436">https://www.loetb.ie/?sfcw-courseid=429436</a>
Laois Offaly ETB	LEAN Black Belt	Level 5 programme	<a href="https://www.loetb.ie/?sfcw-courseid=429481">https://www.loetb.ie/?sfcw-courseid=429481</a>
Laois Offaly ETB	Certificate in Industrial Instrumentation Calibration	(7 days, QQI certified, CPD)	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	Industrial Electrical and Safety Systems	(6 days, QQI certified)	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	Electrical Fault Finding	(2 Days, Certificate of completion)	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	Programmable Logic Controllers	(3 days) (Introduction and Advanced)	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	Certificate in Industrial Manufacturing & Maintenance Skills	(29 weeks)	<a href="https://www.loetb.ie/">https://www.loetb.ie/</a>
Laois Offaly ETB	Certificate in Lean Practice for Sustainable Business, comprised of	Lean Principles for Sustainable Business (5 credit) Lean Tools for Sustainable Business (10 credit)	<a href="https://www.loetb.ie/lean">https://www.loetb.ie/lean</a>

Provider	Course Name	Notes	Course Link for Further Information
Laois Offaly ETB	QQI level 5 Micro Credentials	Environmental Sustainability in the Workplace Lean Practice for Sustainable Business Resource Efficiency for Sustainability The Circular Economy in the Workplace Sustainable Supply Chain Procurement	<a href="https://www.solas.ie/f/70398/x/519e4f293b/6231_6110_solas_sta_green_circularecon_flyer_a4_v8.pdf">https://www.solas.ie/f/70398/x/519e4f293b/6231_6110_solas_sta_green_circularecon_flyer_a4_v8.pdf</a>
Laois Offaly ETB	Social Media for Digital Marketing	QQI Level 5	<a href="https://www.loetb.ie/?sfcw-courseid=443772">https://www.loetb.ie/?sfcw-courseid=443772</a>
Laois Offaly ETB	LC Retail Practice with Digital Marketing	QQI Level 5	<a href="https://www.loetb.ie/?sfcw-courseid=418006">https://www.loetb.ie/?sfcw-courseid=418006</a>
Skillnet	Introduction to Leadership Skills	2 days in classroom or 4 X 0.5 days online	All Skillnet courses are listed in the PDF file available at:  <a href="https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument">https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument</a>
Skillnet	Leadership Skills for Managers in the Food and Drink sector - Online programme	3 days in classroom or 6 X 0.5 days online	
Skillnet	Advanced Diploma in Personal Leadership and Executive Coaching	Blended	
Skillnet	Coaching Essentials for Office, Production Line or Online Conversations	Delivered in 2 x half days, 2 weeks apart to help you practice your skills between each session	
Skillnet	Crisis Communication and Reputation Management	Online plus 1 to 1 coaching	
Skillnet	Cultural Diversity for Supervisors and Managers in the Food and Drink Sector	0.5 days - Delivered as open course or in-company.	



Provider	Course Name	Notes	Course Link for Further Information
Skillnet	Best Practices in National Account Management	Delivered over 2 x full days, or 4 x half days.	<p>All Skillnet courses are listed in the PDF file available at:</p> <p><a href="https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument">https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument</a></p>
Skillnet	Price Volatility and Risk Management for the Food and Drink Sector	Delivered online in 4 x 3-hour modules as follows:	
Skillnet	Graduate and Executive Development Programme for Professionals in the Food and Drink Sector	12-day training programme (in TU Dublin)	
Skillnet	Lean Six Sigma – Yellow Belt	2 days in person or 4 X 0.5 days online	
Skillnet	Lean Six Sigma – Green Belt – Level 6 & 7	1 days training on the tools within each of the DMAIC elements:	
Skillnet	HACCP – Development, Implementation and Verification (QQI Level 5)	2-day programme	
Skillnet	Advanced HACCP Design & Validation based on Risk Assessment (QQI Level 6)	2-day programme	
Skillnet	HACCP Refresher	1-day programme	
Skillnet	Quality Management Systems / Lead Auditor (ISO 9001:2015)	5 days in person or 10 X 0.5 days online	
Skillnet	Traineeship in Meat Industry Skills	Training is customised to individual plant requirements.	
Skillnet	Postgraduate Certificate in Regulatory Affairs	Online/blended programme designed for students who want to study part-time at a pace that matches their work life balance. Live lectures will be provided online weekly and can be accessed throughout the programme	

Provider	Course Name	Notes	Course Link for Further Information
Skillnet	MSc. in Food and Drink Regulatory Affairs	Two years	<p>All Skillnet courses are listed in the PDF file available at:</p> <p><a href="https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument">https://www.fooddrinkirelandskillnet.ie/Sectors/FDI/SKILLNET.nsf/vPages/Training_courses~courses-offered?OpenDocument</a></p>
Skillnet	Post Graduate Certificate in Sustainable Food Systems	Six months	
Skillnet	MSc. in Sustainable Food Systems	Two years part-time	
Skillnet	Certificate in Sustainable Food Packaging	11 X 0.5 days	
Skillnet	Understanding Finance for non-Financial Managers in the Food and Drink sector	1-day programme	
Skillnet	Time Management	1-day programme	
Skillnet	Presentation Skills	1-day programme	
Skillnet	Mentoring Skills	1-day programme	
Skillnet	Personal Productivity with Microsoft Outlook	1-day programme	
Skillnet	Microsoft Excel – Introduction, Intermediate and Advanced	1-day programme	
Local Enterprise Office	Digital School of Food (supported by Bord Bia, TUD, and Enterprise Ireland)	Online with 6 themes to work through	
Bord Bia/ LEO/ Supervalu	Food Academy	10 half day workshops covering 6 modules	<a href="https://www.localenterprise.ie/FoodSupports/Food-Academy-Programme/">https://www.localenterprise.ie/FoodSupports/Food-Academy-Programme/</a>
The Business of Food (Abbeyleix)	Hospitality Business Courses, Consultancy and Online Mentoring	Range	<a href="https://thebusinessoffood.ie/about/">https://thebusinessoffood.ie/about/</a>



Provider	Course Name	Notes	Course Link for Further Information
Local Enterprise Office	Food Starter Programme	Online 4 x 1/2-day programme	<a href="https://www.localenterprise.ie/FoodSupports/Food-Starter-Programme/">https://www.localenterprise.ie/FoodSupports/Food-Starter-Programme/</a>
Fáilte Ireland	Food Tourism Webinars	Series of food webinars	<a href="https://www.failteireland.ie/food-tourism/webinars.aspx">https://www.failteireland.ie/food-tourism/webinars.aspx</a>
Accredited by TU Dublin and Innopharma	Certificate in Food Science and Technology (Limerick- January 2024)	Blended delivery	<a href="https://springboardcourses.ie/details/13565">https://springboardcourses.ie/details/13565</a>
ATU Sligo	L6 Certificate in Validation Technologies (L6 Certificate in Validation Technologies)	Blended delivery	<a href="https://springboardcourses.ie/details/11081">https://springboardcourses.ie/details/11081</a>

Table 8: A sample of the Further and Higher Education Courses in food and drink production

The findings from the review of the academic literature, policy documents, and primary research indicated the range of skills needed to drive further scaling up of regional food production include Artificial Intelligence, Automation and Robotics, and Sustainability Skills. A sample of courses mapped against these themes are presented below. The aim is to provide an indicative list of available courses in the region and not to cover the themes in their entirety. TUS, for example has large Business, Science, and Engineering faculties with dozens of related courses and thousands of students on courses ranging from Digital Marketing to Software to Applied Science, which are directly and indirectly related to the theme at hand.

Theme	Course	Provider	
Artificial Intelligence	BSC Hons Software Design in Artificial Intelligence for Cloud Computing	Technological University of the Shannon	<a href="https://tus.ie/courses/us822/">https://tus.ie/courses/us822/</a>
Artificial Intelligence	MSC Software Design with Artificial Intelligence	Technological University of the Shannon	<a href="https://tus.ie/courses/msc-software-design-with-cloud-native-computing/">https://tus.ie/courses/msc-software-design-with-cloud-native-computing/</a>
Automation and Robotics	B.Eng Hons Automation and Robotics	Technological University of the Shannon	<a href="https://tus.ie/courses/us916/">https://tus.ie/courses/us916/</a>
Automation and Robotics	Engineering Technology	LWETB Longford Town	<a href="http://longfordcfe.com/courses/pre-apprenticeship-course/">http://longfordcfe.com/courses/pre-apprenticeship-course/</a>
Sustainability	Agricultural Science and Sustainability – BSc (Hons)	Technological University of the Shannon (note that this is taught in Thurles)	<a href="https://tus.ie/courses/us870/">https://tus.ie/courses/us870/</a>
Other relevant themes - Lean manufacturing	Lean Six Sigma	LWETB Athlone	<a href="http://athlonetrainingcentre.ie/online-courses/project-management.html">http://athlonetrainingcentre.ie/online-courses/project-management.html</a>
Other relevant themes – Leadership	Leadership	LOETB Portlaoise	<a href="https://www.loetb.ie/?sfcw-courseid=438339">https://www.loetb.ie/?sfcw-courseid=438339</a>

Table 9: Regional courses mapped against AI, Automation and Sustainability themes



# Methodology





# Methodology

The methodology for this audit is a mixed methods study, aiming to both qualify and quantify the skills needs in the region. The study is inductive, qualitative and exploratory. We commenced the study with a review of relevant academic literature, supplemented by an in-depth review of relevant policy material, including international policy material from Europe, national material from Ireland and regional and local material from the Midlands and the four counties.

Some limitations exist with the audit. As with all projects of this type, they are a snapshot in time, providing a cross-sectional analysis of the core issues. As the study is not a longitudinal study, it does not present how attitudes or understanding of food and drink skills needs in the region evolve over time.

## Sampling

The sample for the study includes the following for the qualitative proportion:

- Vocational and Further Education providers
- Higher Education providers
- Craft food and drink businesses
- Larger scale food and drink businesses
- Tourism and food policy makers

## Qualitative Phase

Interviews were conducted online using Microsoft Teams, or where possible in person. There were no unusual occurrences to report during interviews. Interviewees signed an informed consent form. The research adopted an inductive, exploratory, and qualitative approach. Employing a case study strategy grounded in a pragmatic philosophy which aims to support solving the skills needs in the region, we aimed to collect data relating to the challenges faced by food and drink providers in the region. Inductive reasoning, as a method for theory development, was chosen to allow for alternative explanations and a more flexible, non-rigid process, departing from a strict scientific approach, as noted by Saunders et al. (2016). This methodology facilitated a nuanced exploration of the subject matter, fostering a deeper understanding of the skills needs in question. Inductive analysis is a logical thought process that initiates from specific observations and progresses towards broader generalisations and theories. Often labelled as a bottom-up technique, it stands in contrast to deductive sampling, which is described as a top-down approach. In this context, the focus of data collection was to research food and drink skills needs, discern patterns and themes, and construct a conceptual framework. The central aspect was the generation and development of theories. An overview of the entire research design and structure is presented in the following table.

Research Design	Methodology Type
Strategy	Interpretivist and pragmatic
Approach	Qualitative
Data collection	Semi-structured interviews and open survey
Timeframe	Cross Sectional
Analysis	Thematic

Figure 12: Research Design for Qualitative Phase

Throughout the study we have anonymised interviews. Each interview lasted approximately 30 minutes and each interview was recorded. In some interviews more than one participant from the organisation attended, which provided us with a broader view of the relevant issues. Where this occurred, we collected data as a multi-person interview or focus group.

To analyse the qualitative data collected from interviews, we adopted the six-step thematic analysis model proposed by academics Braun and Clarke (Braun & Clarke, 2006).

- **Step 1** Familiarisation with the data involves immersion in the data through multiple readings to gain a deep understanding. We read through the transcribed interviews and took notes on initial thoughts and ideas.
- **Step 2** involves generating initial codes. This step involves identifying and labelling interesting features or patterns in the data. From here we assigned labels or tags to specific portions of the data that seemed relevant to the skills audit.
- **Step 3** searching for themes involved sorting and collating codes to find potential themes. The themes are patterns of meaning that capture something important about the data.
- **Step 4** reviewing themes involved checking the themes against the coded extracts and the entire data set. From here we refined, defined and renamed some of the themes.
- **Step 5** Defining and naming themes is where we developed clear and concise definitions for each theme and created names that encapsulate the essence of each theme.
- **Step 6** Writing the report involved mapping the findings back to the regional issues, the policy context, the literature and developing the questions for the survey. This ensured that the report tells a coherent and compelling story related to the research question.



# Findings – Qualitative



# Findings – Qualitative

This section outlines the qualitative findings, which are derived from Zoom RUN-EU focus groups, an online open-ended survey, interviews with ETBs, the university, policy makers and large-scale producers. Interviews were in-depth, rich and semi-structured and continued until saturation point was reached after 12 interviews from across the region. Each of the qualitative sources are analysed in turn below.

## Initial focus group with RUN-EU partners

An initial focus group was held with Regional University Network partners to establish benchmarks from regional Europe. Partners attended from the Netherlands and Portugal, with further conversations held with representatives from Belgium and Finland. Partners pointed to a number of relevant case studies, policy documents and anecdotes from their regions.

Following a presentation to approximately 80 participants from the RUN-EU network, who represent Science, Business and Engineering disciplines, participants were asked three questions. Those attending included both Irish participants from TUS and beyond, but the regional European counterparts would broadly represent regions similar to the Midlands (e.g. West-Flanders in Belgium where our Howest partner comes from is a rural region, with heavy vegetable and meat production, while the Midlands population of 320,000 would be of a similar size area to Vorarlberg, Austria where our partner FHV is based (with 400,000 people).

### 1. What is happening in your region in relation to food and drink strategies

The following themes emerged in response to this question:

- Sustainability; Local food and drink strategies.
- “Pilgrims Food Masters” - turning to full recyclability as per national requirements.
- Paper packaging proving very difficult with current forming & packaging machinery.
- Automated workflows - less and less general operators.
- Artisan butchers are carving out identities on social networks.
- Greater increase in micro artisan productions.
- More focus on locally owned businesses in the lead up to Christmas.
- Local promotion (and developing) in the touristic area Waddenregio (region on the Waddensee coast).
- Similar size of the area (Vorarlberg) with 400,000 people. Specifically, our region is strong in agricultural production of food and drink also (cheese, soft drinks) with some large, but mostly smaller companies.
- Howest is based in the province of West-Flanders. The province is mainly a rural province, strong in vegetable and meat production. The province heavily supports this industry. The province bundles their support for this industry in 'Fabrieken voor de Toekomst' (translated as 'factories for the future'), in which 'Food' is one of the focus areas (amongst others).

- Further, there is a Research Centre in Kortrijk (city where Howest is based) called 'Veg-i-Tec': University of Ghent is the lead and Howest is partner. In this Research Centre, there are a number of food production lines set up - different parameters can be changed in order to e.g. reduce energy consumption, reduce water consumption, etc. while maintaining high food quality and food security."
- In relation to food strategies, I believe there should be greater incentives for local production so that it can be more self-sustainable.

### 2. Do you have any relevant policy documents you can link us to?

The following links emerged in response to this question. These links were collated, and where the documents were available in English, or could be easily translated, were read and considered for their findings. Where we could not read the document, we met with those who shared it for an overview explanation of the content.

#### Portugal

- <https://www.pratosustentavel.pt/>

#### Austria

- <https://www.kaesestrasse.at/>

#### Ireland (regions outside Midlands)

- <https://www.bordbia.ie/industry/irish-sector-profiles/government-framework/>
- <https://assets.gov.ie/10071/21bb7e661a8d4e8c8a5f24be91f6186b.pdf>
- <https://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Publications/FI-Food-Strategy-Document.pdf>
- <https://www.limerick.ie/sites/default/files/media/documents/2017-06/Food%20Strategy%20for%20Limerick%202016-2018%20-%20Full%20Meeting%20of%20Limerick%20City%20and%20County%20Council.pdf>
- <https://www.ilovelimerick.ie/new-failte-ireland-food-drink-strategy/>
- <https://www.limerickpost.ie/2023/04/22/limerick-hotel-has-new-strategy-to-tackle-food-waste/>
- <https://www.localenterprise.ie/Limerick/Training-Events/Online-Bookings/Food-Starter-Programme111.html>
- <https://www.localenterprise.ie/Limerick/Training-Events/Online-Bookings/EOI-for-Regional-Food-Starter-Programme.html>
- <https://www.milkmarketlimerick.ie/limerick-food-and-drink/capturing-the-artisan-food-story-of-limerick-milk-market/>
- <https://ul.ie/healthy-ul/wellbeing-resources/healthy-eating>

#### Belgium

- Fabrieken voor de Toekomst: <https://www.fabriekenvoortekomst.be/>
- Veg-i-Tec: <https://www.ugent.be/veg-i-tec/en>



### 3. What challenges do you see for SMEs in regional food production in Europe over the next 5-10 years?

The following themes emerged in response to this question:

- Digital transition, Green transition
- Being absorbed by larger UK corporations.
- Containing costs
- Maintaining authentic quality branding
- Fostering local food production
- Cheaper large-scale options often pricing out more local artisanal or small-scale producers
- I am not an expert on food, but I think sustainability is a huge theme, where local production, small chains to consumer would help a lot.
- Sustainability and biodiversity which seems to be in conflict with the local resources and growth ambitions
- Expensive equipment and old equipment
- Small teams
- Lack of understanding of marketing and business
- Health and Safety
- Staff retention
- Dissemination of local culture, including gastronomic culture.
- Labour with the appropriate qualifications.

### Interviews with regional stakeholders – Methodology

Interviews were conducted with stakeholders representing the public and private sector. These included from further and higher education, small and medium sized enterprises, larger scale enterprises, tourism and food policy makers. Expertise interviewed included food and drink sector, hospitality sector, food science, engineering including automation and robotics, tourism and marketing and quality management. Key themes to emerge from the interviews included skill supply and demand challenges, facilities and investment challenges, marketing and reputation issues and course provision investment. These themes are presented in detail in this section, illustrated by anonymised quotes from the respondents.

Number	Sector	Location	Number of Participants	Interview Code
1	Further Education and Training	Longford	2 participants	FET/ VET focus group 1
2	Further Education and Training	Laois-Offaly	5 participants	FET/ VET focus group 2
3	Higher Education	Westmeath	1 participant	HE participant 1
4	Higher Education	Westmeath	1 participant	HE participant 2
5	Higher Education	Westmeath	1 participant	HE participant 3
6	Food and drink SME	Longford	2 participants	SME focus group 1
7	Food and drink SME	Westmeath	1 participant	SME interviewee 2
8	Food and drink SME	Westmeath	1 participant	SME interview 2
9	Tourism Policy Maker	Westmeath	1 participant	Policy Maker interview 1
10	Tourism Policy Maker	Longford, Laois, Offaly and Westmeath	4 participants	Policy Maker focus group 1
11	Tourism Policy Maker	Laois	1 participant	Policy Maker interview 2
12	Large Scale Manufacturer	Offaly	1 participant	Food Producer 1

Table 10: Interviewees location and coding

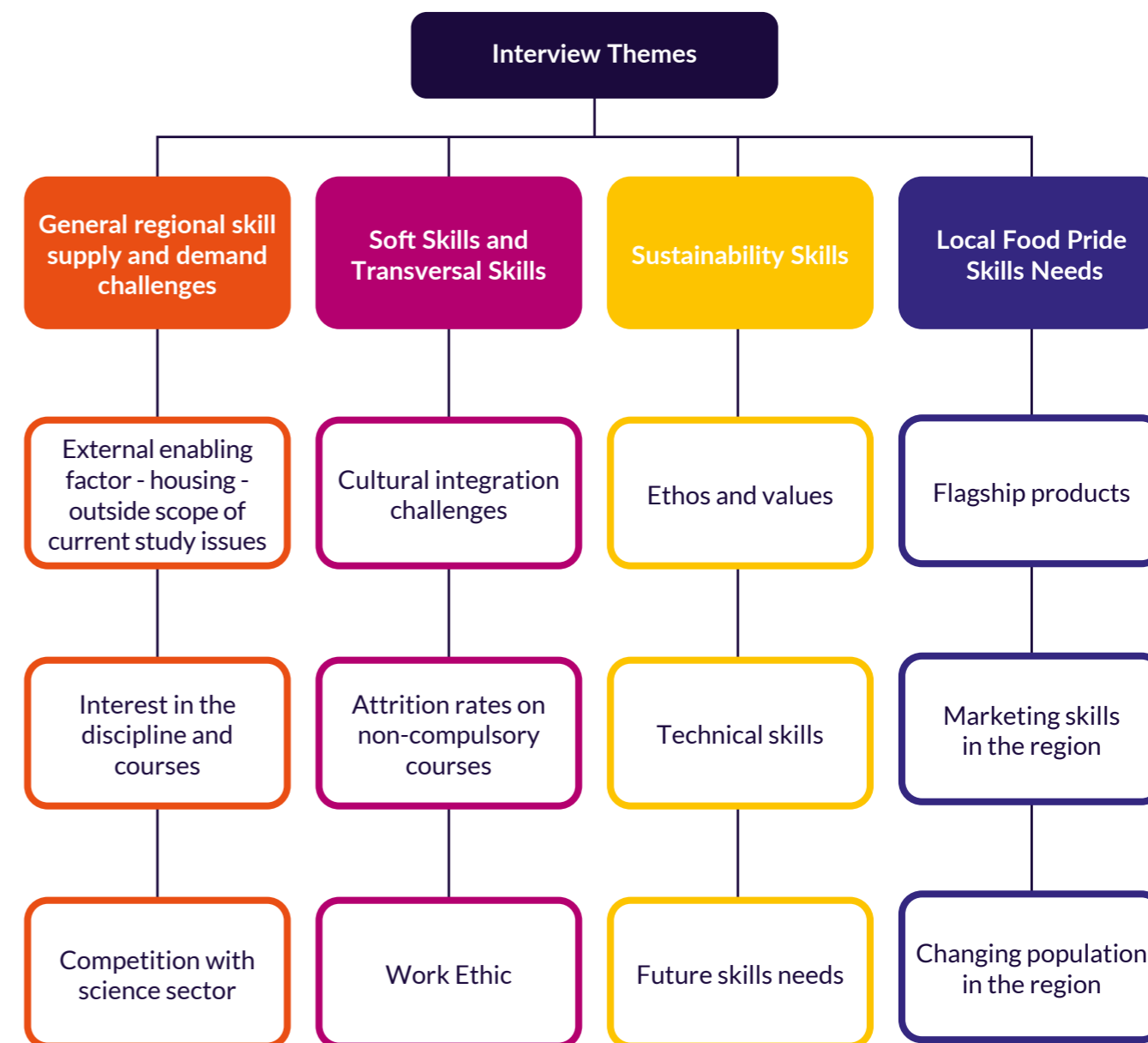
The purpose of this audit is primarily to identify gaps between skills provision and skills needs and to propose recommendations to address these gaps. The interviews were therefore inductive, semi-structured and exploratory, to discover opinions and aspirations around the food industry needs in the region.

Interviews took place online in most instances to facilitate maximum attendance. Participants were briefed on the purpose of the study. An informed consent form was signed by participants. Interviews were recorded and transcribed. Quotations from the interviews are included throughout the section to illustrate the issues discussed.

Number	Sector	Location	Interview Length	Sector	Transcription Word Count	Interview Location
1	Further Education and Training	Longford	25 mins	Education	4,295	Online
2	Further Education and Training	Offaly	26 mins	Education	4,701	Online
3	Higher Education	Westmeath	21 mins	Education	3,940	Online
4	Higher Education	Westmeath	32 mins	Education	5,259	In person
5	Higher Education	Westmeath	38 mins	Education	7,035	Online
6	Food and drink SME	Longford	70 mins	Drinks Industry	12,322	Online
7	Food and drink SME	Westmeath	22 mins	Pastry and Baking	4,802	Online
8	Food and drink SME	Westmeath	20 mins	Ingredients	3,604	Online
9	Tourism Policy Maker	Westmeath	31 mins	Tourism Policy	6,715	Online
10	Tourism Policy Maker	Region	52 mins	Tourism Policy	11,472	Online
11	Tourism Policy Maker	Laois	26 mins	Tourism Policy	4,758	Online
12	Large Scale Manufacturer	Offaly	22 mins	Meat industry	4,746	Online
<b>Total word count &amp; minutes</b>			<b>385 minutes</b> <b>Average 32 minutes</b>	<b>73,649 words</b> <b>Average 6,137 words</b>		

Table 11: Interview details including word count and length

## Interview Findings





### General skill supply and demand challenges

To commence the process interviewees were asked for general thoughts around provision of skills needs training in the region. This general question was intended to provoke reflection and comment on business and soft skills needs, tourism and food business needs, availability of labour and availability of training. Educators in the sector were interviewed first and they reported a number of challenges in recruiting students to study courses related to food and drink provision. It is interesting to start at this point, as crucially it acknowledges provision of the courses, but seeks to explore reasons for low uptake.

Through the interviews, low interest levels were reported in pursuing careers in tourism, as noted below, by one educator in the Further Education sector, for example. Low uptake of a course causes challenges for course viability, given the cost to deliver training and education programmes. While course interest in further and higher education can be cyclical with topics coming in and out of trend, it is clear that at the moment there are relatively low levels of interest in tourism and food related courses in the region.

*"Unless you have 20 on a course, it's not sustainable in management's eyes, so that they don't plan on seeing tourism back, because it's not going to run on its own with 20 students."*

FET/ VET Focus Group 1 Participant

Interest in tourism and food related courses has declined in many countries post COVID19 and this has been extensively researched in the academic literature (Benaraba et al., 2022; Hasenzahl et al., 2022). When asked to explain why they believed there was a lack of interest in a career in food and tourism courses among potential students, respondents noted both the perceived lower pay, but also the lack of knowledge about the subject area.

*"Sometimes I don't think there's enough of it in in second level."*

FET/ VET Focus Group 2 Participant

One SME made a personal observation which complemented the point above noting that:

*"I suppose rewinding back to the days when I was in school there was no mention of a career in food. The closest thing you learned to food back in the day was Home Economics. And that wasn't available in our school."*

SME 2 Interviewee

One provider also noted that there is a mismatch between the jobs in the sector, the county development plan and the interest among students in taking the courses. This causes challenges in running the courses as viability numbers for course provision are not reached. This creates a risk to course provision and would be in conflict with local and regional strategic development plans.

*"There isn't anything really on the wider tourism [sector] as a matter of fact, there's little offering from the ETB and tourism, [even though] it is in the county development plan to do something for tourism, but they are not at the moment because it doesn't fit in with their target ratios."*

FET/ VET Focus Group 1 Participant

An over-provision of courses generally, and not specifically related to food, was also noted, noting that as many further and higher education and training courses are now free or subsidised, it is easy for a learner to sign up to the course, but this can result in a high non-completion or attrition rate. Companies therefore were keen to seek out bespoke training which could be delivered on-site and which they would have some control over – e.g. with staff taking the courses during working hours, as opposed to in the traditional Springboard model which is frequently online in the evenings.

*"I think the reason we're getting approached by companies in the food and drink sector is because I suppose through a Springboard course, it's very much learner initiated and the drop off can be quite high because the program is free. What the company has noticed is the attrition rate has been really, really high because they're not getting that little bit of a push maybe."*

HE Academic 1

Positive developments in the region pointed towards the provision of new courses, with one respondent noting both a trial of a food science curriculum, alongside a new traineeship in culinary arts. Both initiatives are planned to launch in 2024.

*"We are bringing in a kind of standalone Food Science level 5 under applied science next year – the Food Science module has been done and the nutrition module has been done [...] I suppose we're hoping to create that link but at the minute it's just a kind of a trial."*

FET/ VET Focus Group 2 Participant

*"Commencing in February, which will be 24 weeks, so you have a cohort of Culinary Arts staff from the Hospitality sector who are working in it and then you'll have a cohort of students that have no jobs that will be linked in to the course, then to the hospitality sector or as they can progress into a level 5 or a level 6 as a program stepping stone."*

FET/ VET Focus Group 2 Participant

Business management competences were also noted as being well provisioned through courses offered in the region by one interviewee, who listed the most popular Springboard courses offered in the University. The uptake for places on these courses was high from the food manufacturing companies, indicating a desire for both soft skills in terms of management and leadership, and technical skills in lean management and accounting.

*"The supervisory management team, leadership, financial, accounting and payroll operations, quality and lean management was one that was that was quite popular actually particularly with the food processing organisations."*

HE Academic 1

Supply side challenges were also reported due to the lack of science teachers. This ETB noted that it would be difficult to develop courses with content in science, nutrition, health and well-being in the context of food, without the local expertise available to teach it. This reflects some of the national news coverage, which positions Home Economics teachers as being in particular short supply and among the three most in-demand teachers in the country (Deputy Richard O' Donohue, 2022; Ryan-Christensen, 2023).

*"And the reason there's no food science, is we have a limited number of science teachers. They are in demand and they've all been pulled over to second level. There's none teaching in PLC. We have no science teacher. We do have a physics teacher but nothing on food and nutrition. All biology and chemistry teachers have been pulled over to the second level schools."*

FET/ VET Focus Group 1 Participant

*"Teacher recruitment in key areas like Irish, Maths, Home Economics and French are difficult in most second level schools."*

(Deputy Richard O'Donohue, 2022) – secondary source, Motion in Dáil Eireann

SMEs also noted challenges with recruitment. One SME highlighted sales and marketing skills as being in short supply, while another SME highlighted the need for expertise in production line management skills in the region.

*"It's not available in the Midlands, so just for even someone who's in the industry wants to upskill, and the only options currently we can see are Dublin or Cork. Selling is definitely something that I think might need to be addressed in the Midlands so people who are working in it don't have to look at Dublin or Cork."*

SME Focus Group 1 Participant

*"I don't know what type of exact skill it is, but when we've recently tried to hire a production manager, OPS managers and the like, specifically for food manufacturing and they just don't exist today. I think most of the applicants were from abroad."*

SME 2 Interviewee

A theme which came up several times was competition with the medical device sector for staff. Interviewees noted that they believed that the med-tech sector also struggled with attracting staff, including at both general operative and leadership level.

*"If I invest significantly in the quality manager and the skills they get over the next year or two, it will make them more attractive to the Medtech or Med devices guys. There was a point in time where the Med guys wouldn't touch food, but they're under the same similar strain, I guess in relation to being able to attract people and they're reaching back into the food industry now much, much more in my experience than they would have done historically."*

Food Manufacturer 1

One SME highlighted that there is a good range of scientific skills in the region due to existing industry. For example, the SME highlighted that if they needed a skillset in quality management and expertise in biology, there would likely be people in the region who could do the job working in other sectors. However, whether the food and drink manufacturing sector could afford to match the pay rates of the life sciences sector is probably a point worth considering too and state business supports may be needed to help with this.

*"And so, for a lot of the elements I would think there's transferable skills from existing industries in the area. So long as the feedstock of people is there, it's all very well saying there's a transferable skill from a science company to here. Ultimately, it's probably going to be a long time before I can pay people the same as they might get in a life science company."*

SME Focus Group 1 Participant

*"There's quite a lot of Med devices and Med tech going on, and they are sort of ambient facilities. Whereas obviously ours is in fresh and chilled meat, it is colder and wetter and it's just not quite as attractive as sitting in an ambient med tech packing area for example. And the med tech guys, they have the deep pockets so they can afford to pay maybe more."*

Food Manufacturer 1

Companies highlighted skills needs at operative and leadership levels. In many cases housing was mentioned as the root cause of this problem. However, a caveat here is that this is outside the scope of the report and is a nationally recognised challenge to be resolved.



*“The Midlands is perhaps more affordable for housing and that would be true relative to the major cities. But go out there and try to find somewhere. It is an absolute nightmare and it has been since well before 2020. In my previous company, for example, you would go direct to private landlords and secure housing so that we could retain people or bring people into the country.”*

Food Manufacturer 1

Housing emerged as a significant factor affecting recruitment and skills development. While the Midlands offers relatively affordable housing compared to major cities, the challenge lies in finding available properties. The reluctance to recruit from overseas was linked to housing concerns, highlighting the intricate relationship between housing availability and workforce management.

Recruitment from abroad poses a challenge and a risk however, particularly in relation to the provision of housing in the region. SMEs were reluctant to pursue recruitment from overseas as if prospective staff could not obtain accommodation, the business would be left under-staffed in the interim period.

*“Well, one massive reason is housing, which affects every level of recruitment, and it's part of the reason why when we're deep looking at candidates and if they are applying from abroad and they have brilliant CVs, we have to associate a level of risk around housing. Will they be able to relocate here? Can we take that risk, that we offer them the job and then they can't find somewhere and we're stuck for a number of months? We can't, as a small company, wait that long.”*

SME 2 Interviewee

*“If we were to teach something like food science, we would need to separate the science or home economics teachers. We would need the labs and we would need ovens and kitchens and the budget isn't there for that.”*

FET/ VET Focus Group 1 Participant

Challenges were highlighted by the SMEs in terms of personnel and skills they would need to recruit to address skills needs. These included in the areas of logistics and supply chain, automation and robotics, compliance and legislation, marketing, food science and quality management.

*“In terms of sourcing all raw materials, making sure the raw materials are there and getting the goods out the gate and all of the stuff that goes with that. That's something certainly in our aspirations, would we need somebody dedicated to that role in a three to five-year period? Yes, we would. I would think if our business matches where we wanted to go, then I can see that as a separate role because that's what drives value -you can nearly tie that into a procurement function because now you're buying product at the right price, you have somebody focused on buying raw materials at the right prices and establishing that supply chain, securing that supply chain.”*

SME Focus Group 1 Participant

## Soft Skills and Transversal Skills

The second thematic area focussed on in the interviews was on soft skills and transversal skills. Soft skills refer to a set of interpersonal, emotional, and communication abilities that enable individuals to navigate social interactions, collaborate effectively, and adapt to various situations in their roles. Unlike the technical or hard skills specific to food production, such as production line management, quality roles, food science, digital marketing etc., which are specific to the food sector, these skills encompass a broad range of qualities such as communication, teamwork, empathy, problem-solving, adaptability, and leadership. Soft skills are often considered essential for personal and professional success, as they contribute to one's ability to communicate, connect with others, and navigate the complexities of diverse social and professional environments.

We also focussed on transversal skills under this theme, exploring the transferable or cross-cutting skills that can be applied across various contexts and disciplines. These skills are not specific to a particular job or field – e.g. not specifically on food production – but instead have broad applicability – such as having general work experience or general degrees in business, engineering, culinary or science – which allow individuals to adapt and excel in diverse situations. Transversal skills typically include critical thinking, problem-solving, creativity, communication, collaboration, adaptability, and digital literacy. These skills go beyond the technical or domain-specific knowledge required for a particular task and are essential for success in a rapidly changing and interconnected world, where individuals often need to navigate various challenges and collaborate across different domains.

Sales, and the ability to communicate and sell, was highlighted in particular by one of the SMEs, while one higher education academic commented that they were most frequently asked to supply soft skills, as opposed to technical, scientific, or engineering skills.

*“I certainly think the Super Valu Food Academy has helped a lot of small businesses, so that type of program and would be very beneficial. And I think that probably fulfils a skills requirement to a certain level, but then there's only so many get on that type of program. It's also that sort of route to market for the small food producer and I certainly think there there's skills requirements in terms of sales and marketing”*

Policy Maker Focus Group 1

*“We work with a few food-oriented companies in the in the Midlands and one of them - we were out to visit together a few years ago - I suppose they've been back to us a few times and what they're finding is probably the softer skills are a necessity for them in terms of those transversal supervisory management skills.... Now that's also underpinned by what we would see on enrolments for our Springboard Plus courses.... Supervisory management and team leadership programmes funded under Springboard, are really popular again this year.”*

HE Academic 1

One higher education academic pointed towards the challenges of staff development, noting that in their view much of local recruitment was about filling short term needs.

*“There's no real thought given to the progression or growth of that person in a lot of cases where I suppose you bring them in to fill a gap and you're not really focused on growing them and recruiting within the company. People don't want to spend money on putting staff on training courses. They're trying to get their own staff to train them. They don't have the time to train them. They are offering things like online training, LinkedIn learning, that kind of stuff as well, in the hope that that will keep people interested and engaged”*

HE Academic 2

However, a large-scale food manufacturer noted that offering in-house training was crucial, highlighting that while there was a risk staff would leave for better jobs if over-trained, there was a strong risk they would leave anyway if no training was offered.

*“We do provide upskilling and so a number of the leadership team in the facility here would have done Greenbelt training here in the last 12 months on our quality team. We would have done HACCP, internal auditing training, and on our health and safety side of the things we've done risk assessment training. So, we'll free up people to do courses and to do development where we can, I suppose there is probably a bit of a concern are we just training people to move on to another sector.”*

Food Manufacturer 1

With a large population growth in the Midlands region of international employees, there needs to be consideration given in the workplace to different cultures and work practices. This was evident from those previously mentioned.

*“There needs to be some kind of training around cultural differences, cultural backgrounds because of the influx of outside workers. That's huge even for managers themselves. Again, the same cultural differences; conflict resolution, basic management skills are hugely missing as well.”*

HE Academic 2

## Sustainability

The responses from SMEs, educators, and policy makers highlighted various perspectives on sustainability initiatives in the region. Starting from early years and young people, one interviewee commented that the younger workforce, influenced by initiatives like the Green Schools Flag, has played a significant role in driving sustainability changes in businesses. They advocate for reducing plastic use, promoting glass bottles, and incorporating environmentally friendly practices.

*“A lot of the younger staff were able to say we're not doing our best to be sustainable with too much food waste. These are children who have known no different with the Green Schools Flag initiative. They've learned about food waste, they've learned about separating waste and so on. So that's been brought into businesses.”*

Policy Maker 2

In terms of the region as one in the Just Transition parameters, businesses felt encouraged to adopt sustainability policies, with potential funding for green certification. Some educational institutions integrate sustainability into their teaching content, aligning with external expectations and programmatic reviews.

*“Under this program in the Just Transition region, a lot of businesses will start looking at their sustainability policies and they will get funded to get green certification.”*

Policy Maker 2

To capitalise on this issue, interviewees felt we need to focus on expertise in the region. This could be achieved through integration of sustainability content across all educational curricula. This is increasingly integrated into program content, responding to external expectations and the emphasis on green practices. While there is recognition of sustainability importance, there are limitations in upskilling areas such as quality, robotics, entrepreneurship, and sustainability due to the lack of subject matter experts.

*“We were lacking in sustainability, definitely. And we've commenced a lot of sustainability courses like Lean Management courses out in the sector and they're progressing a lot.”*

FET/ VET Focus Group 1 Participant

Diverse Approaches to Sustainability were also highlighted and this could potentially be mapped onto a spectrum. Companies display varying levels of commitment to sustainability, ranging from mission statements, annual reports on waste reduction, and engagement in circular economy practices to others prioritising production and cost without a strong focus on sustainability.



*"We might be outliers in this, but to find that same care about sustainability in our team is what we would love to build, we're trying to build a team with the best culture around SUSTAINABILITY and it's very hard to find those people that really have bought in and say "OK, I know I'm up for this. I know the challenge and the mission you guys are on and I want to be part of it." It's very hard to find that."*

SME 2 Interviewee

## Local Food Pride and Skills Needs

Producers and SMEs responded to questions on local food pride and skills needs by highlighting the need for additional markets and additional sales channels in the region. They also spoke about the tourism potential of the same and there was good acknowledgment of the untapped tourism potential in showcasing the food story of the region. Collaborative marketing and reinvigorating networks like the Athlone Food Circle, the Westmeath Food Network and Offaly Delicious etc., aim to connect food producers and create a compelling narrative for visitors.

*"We're not known for it. If you take food destinations - the ones that kind of spring to mind are down around Cork, maybe Kerry, you think of the cows eating the grass in Kerry, and you're thinking the Boyne Valley, they have a great name up there. It's a bit of a food destination, but in terms of the Midlands, that's never really been there that I know of."*

SME 2 Interviewee

However, this is challenging for the SMEs as ultimately their skill set is food production and not tourism attraction development.

*"[For] food producers to market their product, that is not their skill set. Their skill set is the food production. I've seen it with a nearly all of the food producers here in the county and that tourism aspect is lacking. There's two or three that would absolutely love to install a visitor centre for tourists to come and experience their food production and food and tastings and all that. But time and the scale of how to do that when they are inherently farmers and producers and so on. They're not hospitality people."*

Policy Maker 2

Reputation also arose as a discussion point with SMEs noting that there was good local pride in the regional food produce but that this had not translated yet into a national recognition.

*"[regarding Midlands reputation] Unfortunately, food is not the first thing that springs to mind."*

FET/ VET Focus Group 1 Participant

*"They're very passionate about the product and producing the product. But they're not necessarily coming from sales and marketing background. And I know in terms of the food networks and food producer networks, I know they exist and they exist all around the country and some probably perform better than others. I think where there is a strong network that has enough funding to be led by somebody that may come from a sales and marketing background."*

Policy Maker 2

Finally, another interviewee offered an alternative point that if another country had our resources they would not hold back in capitalising on the market value of it.

*"I think there's a little bit of lack of pride and I think it's something that we need to I think we need to look at. And really, it's a good example of how we don't have pride in a product that is the second biggest in the world and that probably is something that's kind of an inherent to our Irish makeup and we need to get better at it. I don't know how to put it because it's not about upping your game. We already have food that's famous worldwide, but we kind of forget about it ourselves. You don't shout enough about it and I don't like going back to whiskey all the time, and I apologise in advance, but the Scots are there are just so super proud of their products, but because of our unhealthy relationship with alcohol, we don't shout about as much."*

Policy Maker 2

One specific example which arose several times was the need to promote local food on menus in the region. For example, one interviewee described having whiskey flavoured porridge in a hotel in Tullamore, but noted 'I don't see that happening very much to be honest with you'.

# Findings – Quantitative





# Findings – Quantitative

For the quantitative phase of the skills audit we designed an online survey to distribute to food and drink businesses in the region. The survey was designed on Microsoft Forms and utilised a mixture of qualitative and quantitative questions. These included Likert scale questions, open ended questions and yes/no type questions. The survey was designed in TUS and shared with the Steering Group to pilot the questions. Several minor changes to the questions were returned and the questionnaire was refined.

## Population and Sample

The survey was distributed to the entire population of contributors to the Midlands Food and Drink Directory (n=85) and also distributed via LinkedIn to reach as wide an audience as possible.

This method of convenience and self-selection sampling, also known as a volunteer or self-nominated sample, is a type of sampling method where individuals choose to participate in a study on their own accord. i.e. the participants who received the survey link either by email or by LinkedIn or other social media platforms had no obligation to participate.

In this approach, participants voluntarily decide to be part of the research based on their interest, motivation, or perceived relevance to the study topic.

This sampling method is common in various research contexts, particularly in online surveys, experimental studies, or as in this case for SME supports. While self-selected samples offer convenience and ease of recruitment, the technique has inherent limitations.

The individuals who choose to participate may not be representative of the broader population of food

and drink producers in the region, as their decision to join the study could be influenced by specific characteristics or experiences. This can introduce selection bias and affect the generalisability of the findings.



Figure 13: Screenshot of the skills survey

## Survey Responses and Analysis

The following section presents and commences analysis of the responses to the questions in the online survey. Eighteen (n=18) responses were received to the survey. Questions are analysed individually unless otherwise stated. The survey was distributed to all members of the Midlands Food and Drink Directory and also shared and promoted online.

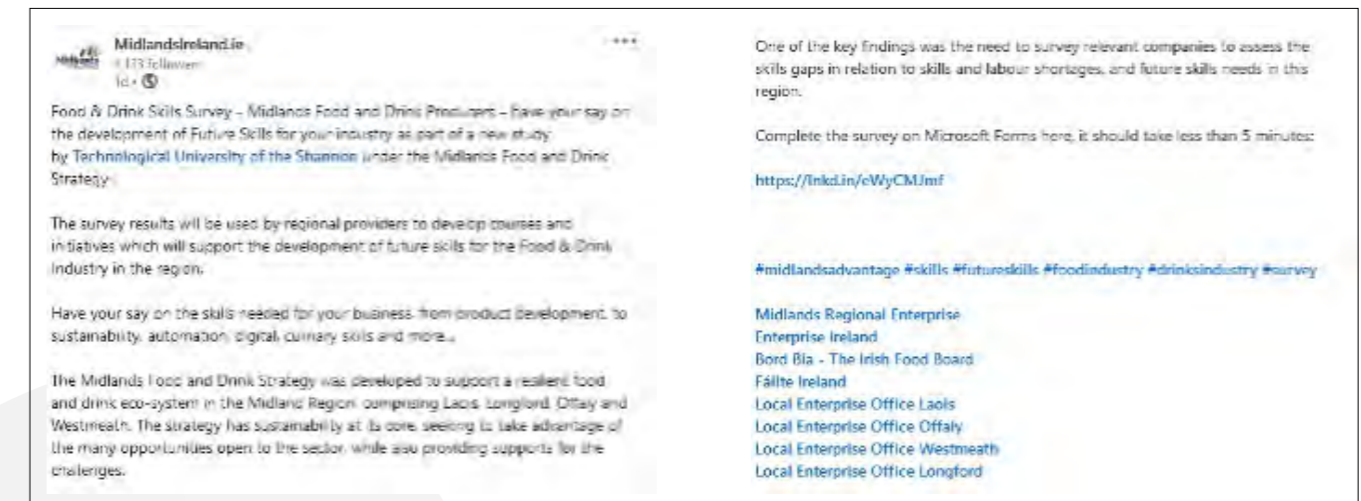
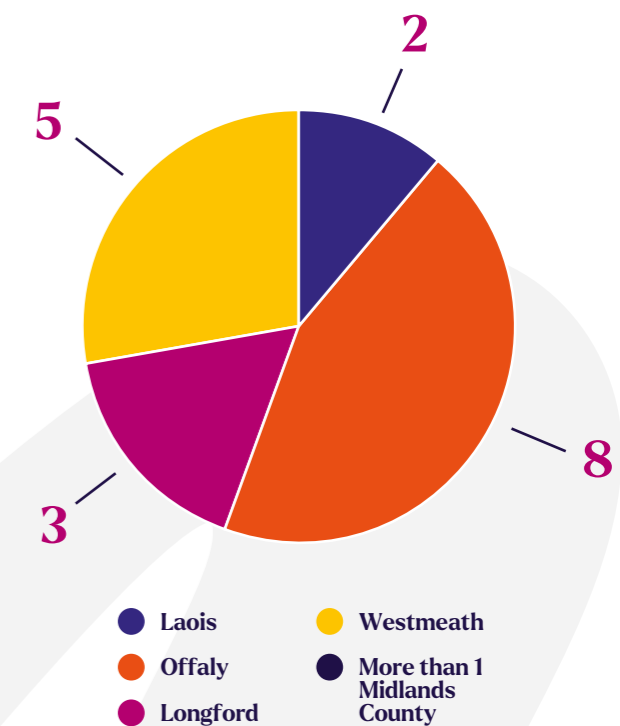


Figure 14: LinkedIn post from MidlandsIreland.ie promoting the survey

### Question 1: Where is your company based?

This information gives an indication of the distribution of surveyed companies across the different regions (Westmeath, Offaly, Laois, and Longford) within the Midland Region.

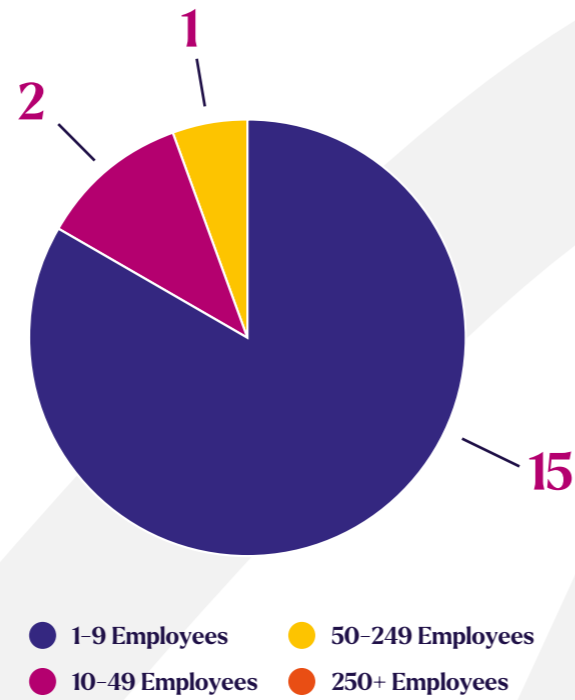
It could be valuable for understanding the geographical concentration of the food and drink sector in the area and tailoring strategies or interventions accordingly.



**Question 2:**  
How many people work in your company?

This indicates that the majority of the surveyed companies in the food and drink sector in the Midlands Region have a relatively small workforce, with most having 1-9 employees.

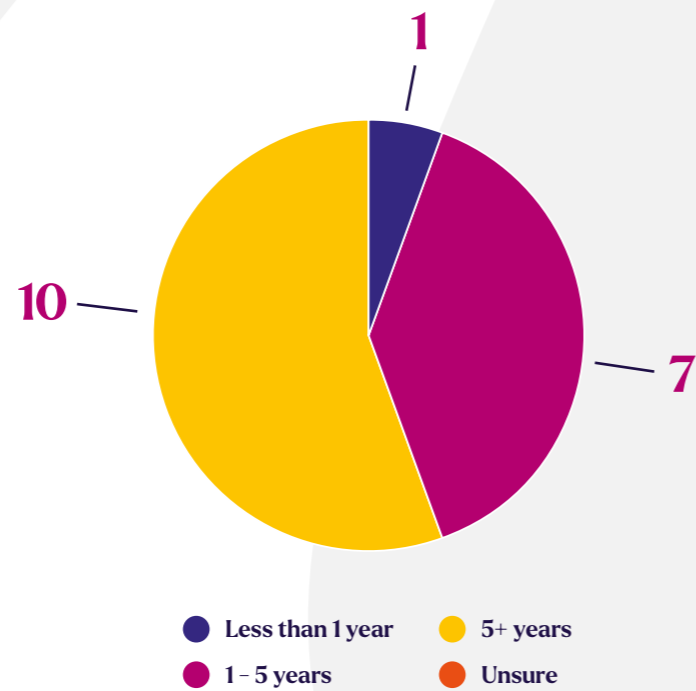
There are a few companies with a slightly larger employee base (10-49 and 50-249 employees). Understanding the size of these companies can be crucial for identifying the scale of operations and potential areas for workforce development or support.



**Question 3:**  
How many years has your company been operating in the food and drink sector?

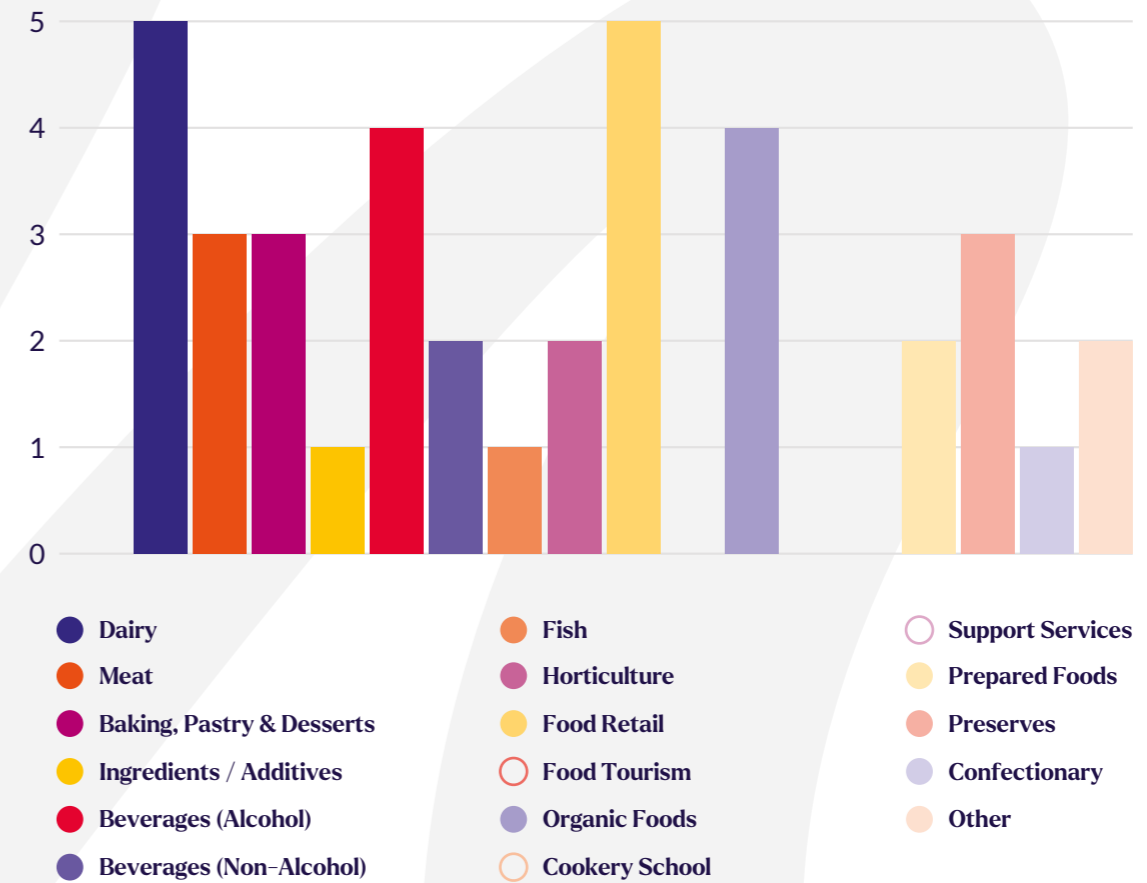
This breakdown provides insights into the experience levels of the surveyed companies in the food and drink sector within the Midlands Region.

The majority of companies have been operating for 5 years or more, indicating a relatively established presence in the industry. However, there are also a few companies that are relatively new to the sector (less than 1 year or 1 to 5 years), suggesting a mix of both experienced and newer enterprises in the region. Understanding the duration of operation can be important for addressing challenges specific to different stages of business development.



**Question 4:**  
What sector is your company involved in? Please tick all that apply.

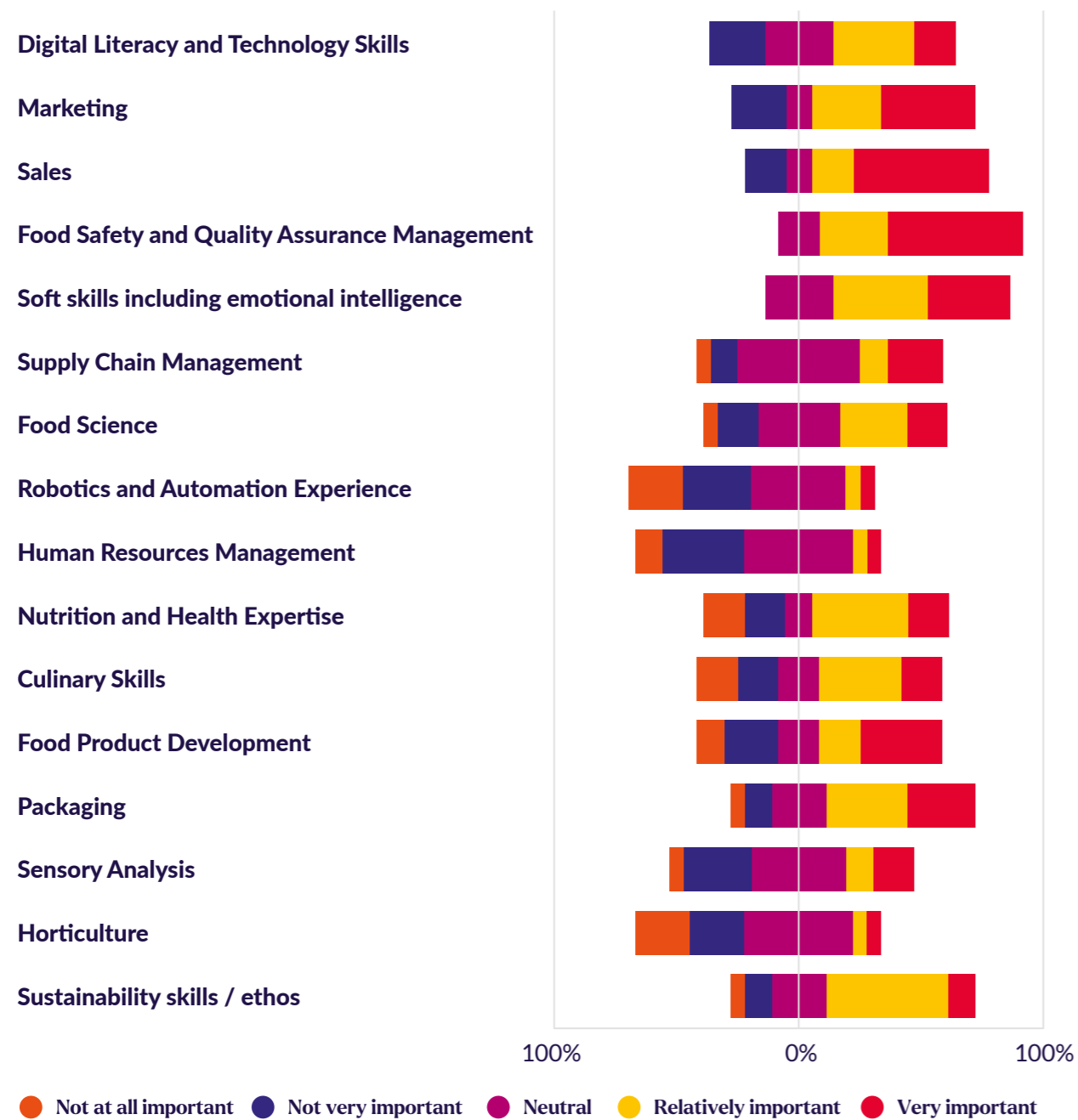
These findings highlight the diversity of sectors within the food and drink industry that are represented by the surveyed companies in the Midlands Region. It's evident that companies are involved in various aspects, including production, retail, and specific product categories such as organic foods, dairy, meat, and beverages. Understanding this diversity is crucial for tailoring strategies to address the unique challenges and opportunities within each sector.





**Question 5:**  
**When you seek to employ new staff, or upskill existing staff, please rank the below in terms of importance in what you seek to find or improve.**

This indicates that, overall, the importance of Digital Literacy and Technology Skills is recognised by a majority of respondents, with a significant portion ranking it as either very important or relatively important. However, there are also a notable number of respondents who provided neutral or not very important rankings, suggesting some diversity in perspectives regarding the significance of these skills in the context of hiring or upskilling within the food and drink sector in the Midlands Region.



**Digital Literacy and Technology Skills:** Overall, there is a mixed perception of the importance of digital literacy and technology skills. While a significant number of respondents find it important, there is also a notable portion that is neutral or considers it not very important.

**Marketing:** Marketing skills are generally perceived as important, with the majority ranking it as very important or relatively important. This suggests a recognition of the significance of marketing in the food and drink sector.

**Sales:** Sales skills are highly valued, with the majority ranking them as very important. This underscores the importance of strong sales capabilities in the industry.

**Food Safety and Quality Assurance Management:** There is a strong consensus on the importance of food safety and quality assurance management skills. The majority of respondents consider them very important, noting the critical role these skills play in the sector.

**Soft Skills, including Emotional Intelligence:** There is a diverse range of opinions on the importance of soft skills. While a considerable number find them relatively important, there is also a significant portion that is neutral. This suggests varied perspectives on the significance of soft skills in the sector.

**Food Science:** Food science is perceived as relatively important, with a mix of responses ranging from very important to not at all important. This indicates some interest in the importance of food science skills.

**Robotics and Automation Experience:** There is a mixed perception of the importance of robotics and automation experience. The responses vary across the spectrum, from very important to not at all important, highlighting a diversity of views on the relevance of these skills.

**Human Resources Management:** Human resources management is viewed with varying degrees of importance. A significant portion of respondents is neutral or finds it not very important, indicating a range of opinions on the significance of HR skills.

**Nutrition and Health Expertise:** Nutrition and health expertise are perceived as relatively important, with a balance of responses. This suggests a moderate emphasis on the importance of these skills in the sector.

**Culinary Skills:** Culinary skills are seen as relatively important, with a mix of responses. This indicates some interest the importance of culinary skills within the food and drink sector.

**Food Product Development:** Food product development is considered relatively important, with a balance of responses. This suggests a small focus on innovation and product development in the sector.

**Packaging:** Packaging skills are viewed with varying degrees of importance. While some respondents find it very important, others consider it not very important. This indicates diverse perspectives on the significance of packaging skills.

**Sensory Analysis:** Sensory analysis is perceived with mixed importance. There is a range of responses from very important to not at all important, indicating varied views on the relevance of sensory analysis skills.

**Horticulture:** Horticulture is generally perceived with moderate importance, with a balance of responses. This suggests some interest in horticultural skills within the food and drink sector.

**Sustainability Skills/Ethos:** Sustainability skills/ethos are viewed as relatively important, with a mix of responses. This suggests some interest in sustainability within the sector, but opinions vary on the level of importance.

In summary for Q5, the macro analysis reveals a diverse set of perspectives on the importance of different skills within the food and drink sector in the Midlands Region. While there is consensus on the importance of certain skills like sales and food safety, there are varying opinions on others, most likely reflecting the multifaceted nature of the region and the industry and the range of skills required for success.

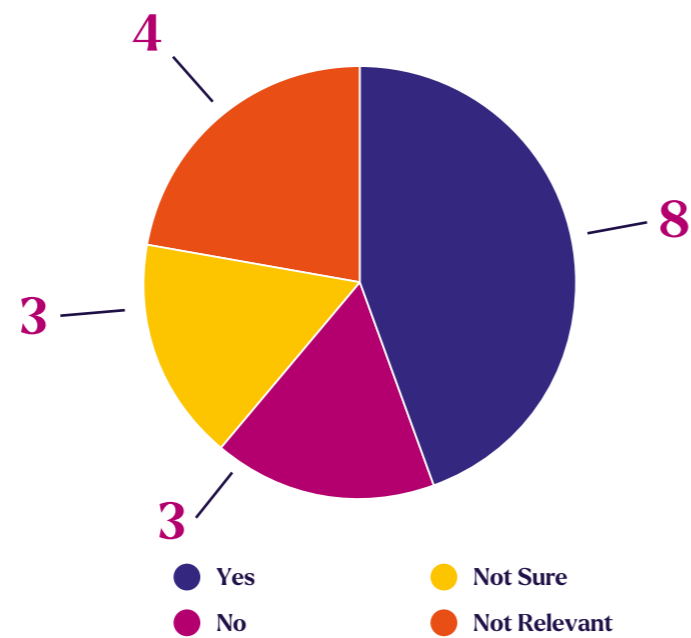




Questions 7-8 are analysed together.

**Question 7:**  
Have you faced challenges in recruiting employees with the required skills in the past 12 months?

**Question 8:**  
If yes, please specify the types of skills that were challenging to find.



The responses to Questions 7 and 8 implied that a significant portion of employers in the Food and Drink sector have experienced difficulties in finding candidates with the necessary skills over the past year. Based on the responses, the types of skills that were challenging to find in the past 12 months include:

**General:** The response suggests a general difficulty in finding suitable candidates for any roles within the organisation.

**Food Safety:** Specific mention of challenges in finding candidates with a certain level of food safety certification, indicating a need for individuals with a particular qualification.

**Willing to Work the Hours:** The importance of flexibility in working hours is highlighted, and finding candidates with the willingness to accommodate specific work schedules was challenging.

**Interest in Doing a Job Well and Receiving Payment:** The response reflects a broader concern about finding individuals who are genuinely interested in performing well on the job and are motivated by more than just financial compensation.

**High-Level Management, Technical, Experienced Staff:** Challenges in recruiting individuals for roles requiring high-level management skills, technical expertise, and experience.

**Sales:** Specific challenges in recruiting individuals with sales skills, noting the difficulty in finding qualified sales professionals.

**Willingness to Work Unsociable Hours, Personality Issues, Desire to Work Hard, Motivation:** These challenges encompass a range of factors, including candidates' willingness to work non-traditional hours, addressing personality conflicts, finding individuals with a strong work ethic, and motivation.

These responses provide a detailed insight into the specific skills and attributes that have posed challenges for employers in the Food and Drink sector. The challenges mentioned highlight a diverse set of issues, including technical qualifications, work ethic, and the availability of candidates with specific certifications or skills. Understanding these challenges can inform strategies for improving recruitment processes and addressing skill gaps in the industry.

**Question 9:**

What strategies, if any, has your company employed to address skills gaps (e.g., training programs, partnerships with educational institutions, contractors)?

Respondents noted a mix of strategies to address the skills gaps, including:

5 respondents (36%) answered **training** for this question.



**Employed a Local Food Safety Training Company:**

This strategy involves outsourcing to a local food safety training company to address specific skill gaps related to food safety.

**Partnerships with Tourism Offices & Local Enterprise Office:**

Collaborating with tourism offices and the local enterprise office to access resources such as online training programs and grant systems. This approach aims to provide staff with adequate and valuable training.

**On-the-Ground Information & Jobs Centres:**

Utilising on-the-ground information as a resource to address skills gaps, indicating a proactive approach to sourcing talent.

**Word of Mouth:** Relying on word of mouth, possibly through referrals, to identify and recruit individuals with the required skills.

**Training Programs and Internal Work:** Implementing internal training programs and doing the main bulk of the work in-house.

**Specific courses, e.g. WSET (Wine & Spirits Education Trust) Training and Sensory Training:**

Engaging in ongoing WSET training in spirits, completing micro-credential courses, planning sensory training, and committing to sales

management training. These initiatives indicate a focus on continuous learning and professional development.

**Attendance at Industry Events:** Regular attendance at industry events organised by the Irish Whiskey Association, Knowledge Still, Drinks Ireland, and Bord Bia Brand Forum. Participating in such events can provide exposure to industry trends and best practices.

**Private Consultants for Training:** Utilising private consultants to provide training, indicating a tailored approach to address specific skill gaps.

**Outsourcing with County Council and Local Enterprise Office (LEO):** Outsourcing with the support of the County Council and Local Enterprise Office to meet skill gaps. Collaborating with local government entities can provide additional resources.

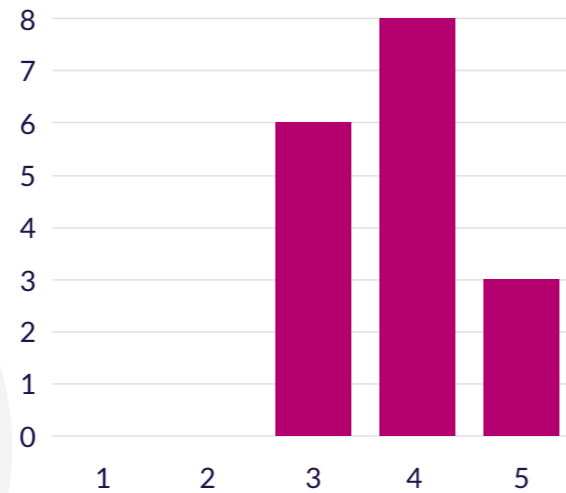
**Rapid Growth and Small Companies:** Acknowledging the difficulty in identifying skill gaps, especially in situations of rapid growth or for small companies. This highlights the challenge of managing skills development amidst other operational priorities.

Questions 10-12 are analysed together.

**Question 10:**  
Please self-evaluate your company's current sustainability practices in the food and drink sector.

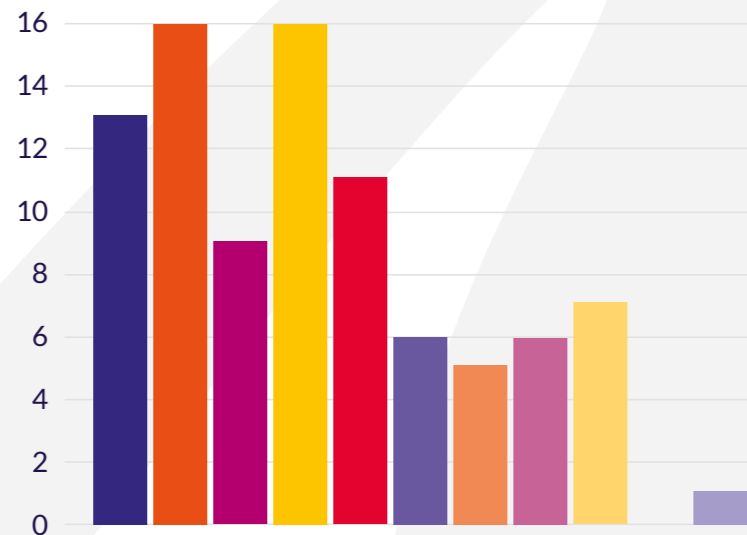
- 1 Star - Poor,                      4 Star - Good
- 2 Star - Below Average      5 Star - Excellent
- 3 Star - Average

3.82 Average Rating



**Question 11:**  
What sustainability initiatives is your company currently implementing? (Select all that apply)

- Local sourcing of ingredients
- Waste reduction and recycling
- Energy efficiency measures
- Eco-friendly packaging materials
- Packaging reduction
- Packaging return schemes
- Renewable energy measure
- Organic Practices
- Circular Economy Practices
- None at present
- Other



**Question 12:**  
What challenges, if any, have you encountered in implementing sustainable practices in your company?

Issues highlighted from the responses to the sustainability related questions included:

8 respondents (50%) answered **Cost** for this question.



**Supply Chain Cost for Sustainable Goods:** The cost associated with sourcing sustainable goods through the supply chain is identified as a challenge.

**No Financial Support for Novel Initiatives:** E.g. Lack of financial support for hemp-related initiatives poses a challenge, indicating potential barriers to implementing certain sustainable practices.

**Awareness & Social Responsibility:** The challenge of raising awareness and instilling a sense of social responsibility among stakeholders is noted.

**Cost of Renewable Packaging and Ingredient Availability:** The cost of renewable packaging and the limited availability of some ingredients locally pose challenges to sustainability efforts.

**Recycling and Packaging:** Challenges related to recycling processes and packaging are mentioned, highlighting complexities in waste management and packaging materials.

**Staff Adherence to Reduction Measures:** Encountering difficulties in getting staff to adhere to measures aimed at reducing packaging usage.

**Circular Economy Principles and Co-Products Reuse:** Challenges related to implementing Circular Economy principles and reusing co-products (spent grain, pot ale, gin stillage, spent gin botanicals, and citrus residue) in other products.

**Time and Costs for Program Implementation:** The need for time and investment to implement sustainable programs is identified as a challenge.

**Perceived Lack of Concern from Regulatory Authorities:** The perception that regulatory authorities, specifically FSAI (Food Safety Authority of Ireland), may not prioritise reducing plastic and could be seen as supportive of single-use plastics.

**Sourcing Sustainable Packaging:** Difficulty in sourcing sustainable packaging that meets criteria of being environmentally friendly, affordable, and attractive.

**Budget Constraints and Manpower Allocation:** Budget constraints and challenges in allocating manpower to sustainable initiatives are mentioned.

**Limited Alternatives in Packaging:** The lack of suitable, affordable, and attractive alternatives in packaging is highlighted as a challenge.

These challenges reflect the complex nature of integrating sustainability into business operations, encompassing economic, social, and operational considerations. Overcoming these challenges may require a combination of financial support, awareness-building efforts, and strategic planning to balance sustainability goals with economic considerations.



**Question 13:**

**What support or resources do you think would be beneficial for your company to address sustainability skills gaps?**

Based on the responses, companies in the Food and Drink sector have identified several support and resource needs to address sustainability skills gaps. Here is a summary of the mentioned suggestions:

8 respondents (50%) answered **Cost** for this question.



**Materials Sourcing:** Support in sourcing sustainable materials, indicating a need for assistance in identifying and accessing environmentally friendly raw materials.

**Food Science & Production Skills:** Resources and support in acquiring food science and production skills, noting the importance of skills development in these specific areas.

**Participation in Sustainability Programs (e.g., Origin Green):** Involvement in sustainability programs like Origin Green is considered beneficial for driving sustainability skills and goals.

**Education and Tax Incentives:** Educational support and potential tax incentives for sustainability initiatives, with a recognition that a macro approach at the community level is necessary.

**Short and Pointed Online Courses:** Online courses that are short and to the point, indicating a preference for focused and easily accessible learning resources.

**Funding for Energy and Water Metering:** Higher levels of funding for metering energy and water use in the business, highlighting the importance of tracking resource consumption.

**Consultancy Services:** Consultancy services are seen as a valuable resource, suggesting that external expertise can be beneficial for addressing sustainability skills gaps.

**Staff Training in Their Own Language:** Language-specific staff training is mentioned as a potential resource, recognising the importance of effective communication in training programs.

**Upskilling Through Learning Initiatives:** Upskilling employees through learning initiatives and projects that focus on green skills and sustainability knowledge.

**Funding and Implementation Support:** Funding support and assistance in the implementation of sustainability initiatives are considered crucial resources.

**Funding for New Employees:** Funding for new employees to support the hiring of individuals with the necessary sustainability skills.

**Sales and Business Training:** More sales and business training for staff, along with incentives or grants for using compostable or recyclable packaging.

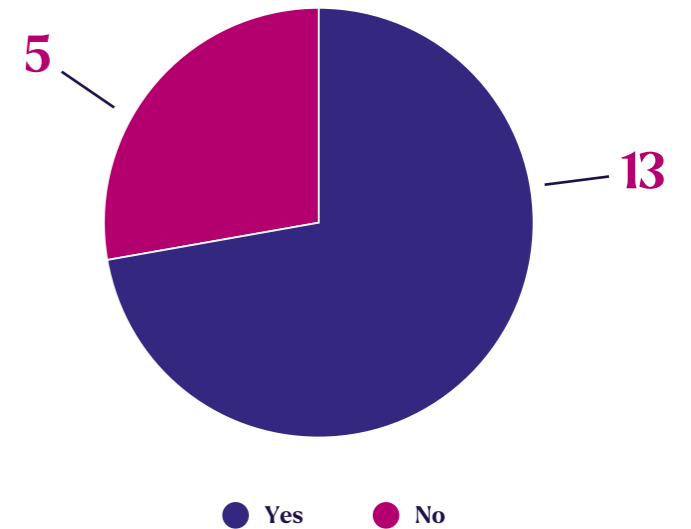
**Increased Financial Help for Renewable Energy:** Increased financial assistance for adopting renewable energy sources, particularly the financial aspect of sustainability initiatives.

**Participation in Accelerator Programs:** Participation in accelerator programs, such as the Bord na Mona Accelerator Green Programme, is seen as beneficial for learning.

**Awareness Initiatives Through Media and Local Councils:** Calls for more courses on sustainability practices and increased awareness initiatives through media and local councils.

Questions 14 and 15 are analysed together.

**Question 14:**  
**Have you (personally) undertaken any upskilling in the food and drink sector in the past 2 years?**



**Question 15:**  
**If yes, please specify what course/ training you undertook.**

4 respondents (31%) answered **food** for this question.



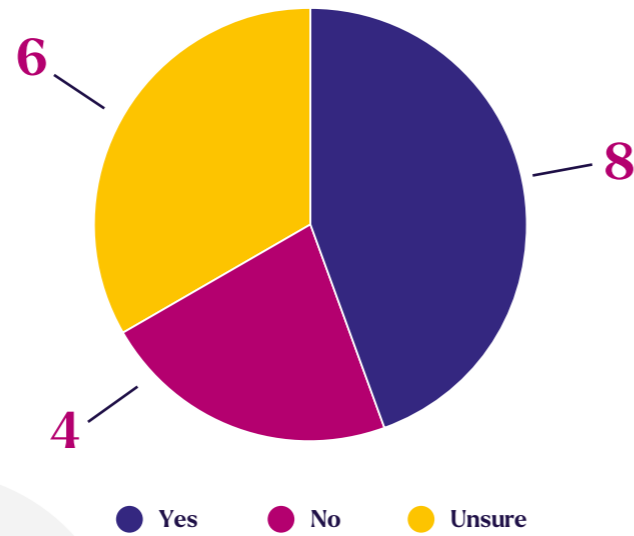
The responses indicate a positive trend in upskilling within the Food and Drink sector, with a majority (13 of 18) having undertaken personal development in the past two years. The courses/training vary from technical aspects like HACCP and organic farming to broader skills such as digital marketing and sustainable nutrition.

The emphasis on staying updated with the latest innovations, reliance on global manufacturers/suppliers, and engagement with external experts and consultants reflects a commitment to continuous learning. Mentoring with Local Enterprise Offices, participation in food development projects, and courses in leadership and innovation highlight a good approach to skill enhancement among our local SMEs and this proactive upskilling approach aligns with the dynamic nature of the industry.

That said, almost one third of the population replying noted they had not taken part in upskilling. While this is likely due to time or resource constraints, there are opportunities here to increase the numbers participating in courses across the sector.

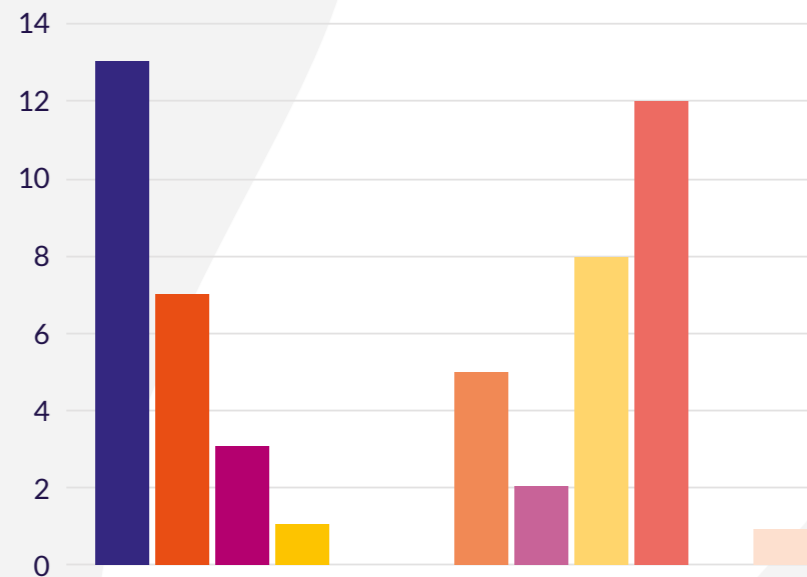
Questions 16 and 17 are analysed together.

**Question 16:**  
Do you expect your company employee numbers to grow in the next 2 years?



**Question 17:**  
What skills or training do you plan to provide or source in the next two years?  
(please tick all that apply)

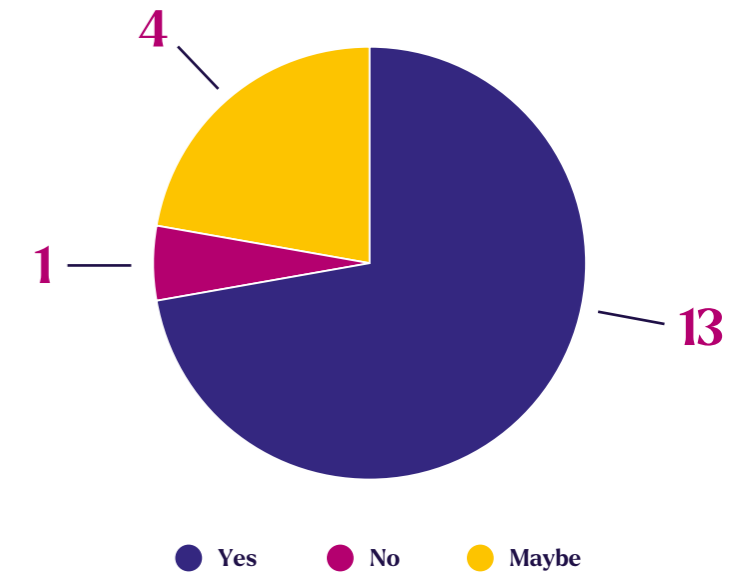
- Food Safety Training
- Sustainability Training
- Food Service / Quality
- Robotics / Automation
- Artificial Intelligence
- VR / XR
- Soft Skills Training
- Legislation
- Customer Care / Retail
- Sales and Marketing
- No plans at present
- Other



The responses indicate a varied outlook on company growth in the next two years, with a mix of affirmative, uncertain, and negative expectations. Despite the uncertainty, there is a clear focus on planned skills development. The identified training priorities include Food Safety, Sustainability, and Sales/Marketing, aligning with the dynamic needs of the Food and Drink sector. The emphasis on Soft Skills, Legislation, and emerging technologies like Robotics/Automation suggests a holistic approach to workforce readiness. The proactive intention to address these skill areas aligns with the potential growth outlook, demonstrating a strategic alignment between anticipated company expansion and the acquisition of essential skills to navigate the evolving landscape of the industry.

Questions 18 and 19 are analysed together.

**Question 18:**  
Would your company be interested in collaborating with other SMEs, educational institutions, or industry bodies to address common challenges in the food and drink sector?



**Question 19:**  
If yes or maybe, please specify the type of collaborations your company would be interested in.



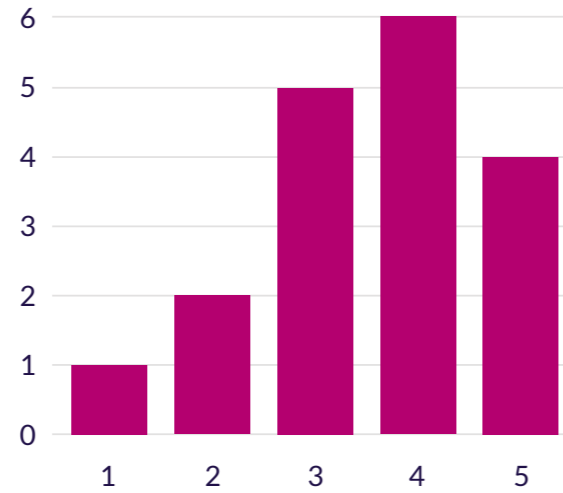
The responses reflect a strong willingness among companies in the Food and Drink sector to collaborate on common challenges. There is a predominant interest in knowledge-sharing initiatives, particularly in addressing food safety best practices and legislation. Collaborations with industry bodies like Bord Bia for programs such as Origin Green are also highlighted. Other areas of interest include joint purchasing, marketing and strategic planning, product design for organic and local food production, and addressing challenges with national distribution. The expressed desire for collaboration with local communities and educational institutions such as TUS and the ETBs and LEOs demonstrated a broader commitment to community engagement and knowledge exchange. Overall, the responses position the Midlands Food and Drink sector's recognition of the value in collaborative efforts to navigate industry challenges effectively.



Questions 20 and 21 are analysed together.

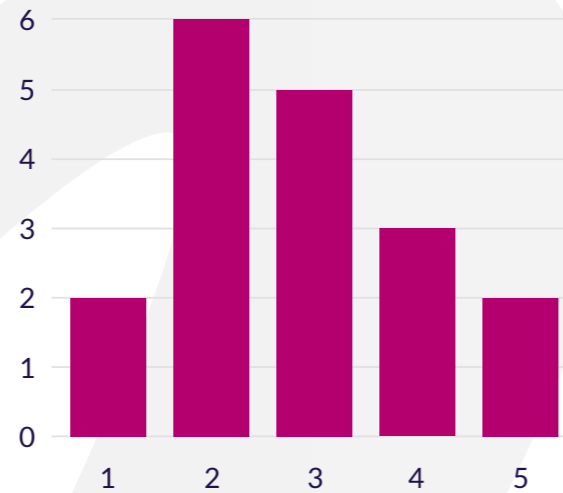
**Question 20:**  
How would you rate local pride in Midlands food and drink industry?

3.56 Average Rating



**Question 21:**  
How would you rate national awareness of the Midlands food and drink offering?

2.83 Average Rating



The ratings suggest a moderate to positive sentiment towards local pride in the Midlands Food and Drink industry, with most responses falling between 3 and 5. However, there was a notable divergence in opinions, indicating some variability in perceptions within the region. On the national level, the ratings skew towards the lower end, predominantly between 1 and 3, suggesting a perceived lower awareness of the Midlands' food and drink offerings at a national scale. These responses highlight a potential gap between local appreciation and national recognition, indicating an opportunity for concerted efforts to enhance awareness and promote the region's culinary contributions on a broader scale.

**Question 22:**  
What additional upskilling or training courses would you like to see offered in the Midlands region in relation to food and drink production?



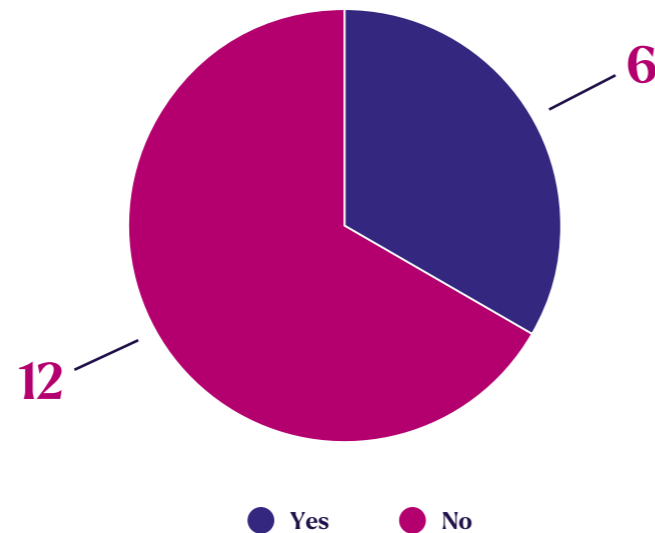
The open-ended responses for this question reflected a clear demand for industry-specific training in food safety, science, and technology. There is a notable interest in marketing support and collaboration opportunities between small craft businesses and larger establishments. The desire for courses fostering social conscience development aligns with the growing emphasis on sustainability. Additionally, the need for flexible timing for digital media courses indicates a practical consideration for accommodating work schedules.

The ongoing leader course in business storytelling and green footprint demonstrates a commitment to leadership skills and environmental awareness. Overall, the expressed interest in sales courses, promotions training, and the formation of regional food groups underscores a holistic approach to upskilling that addresses both technical and collaborative aspects in the Midlands food and drink production sector.

**Question 23:**  
**Does your business premises currently or plan to offer a visitor experience?**

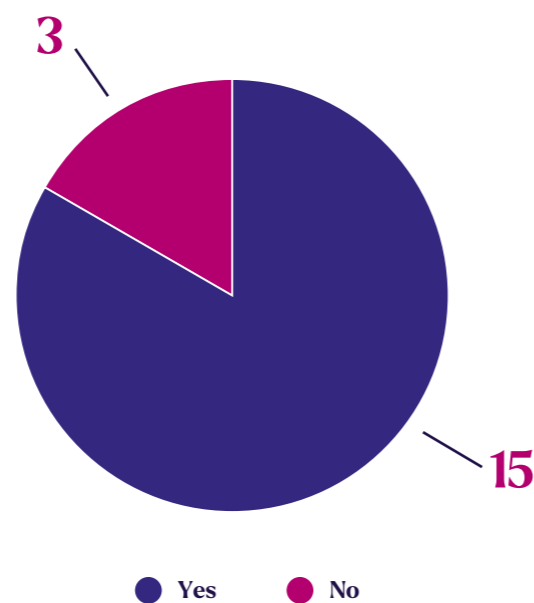
The responses indicate a mix of businesses in the food and drink sector with varying intentions regarding visitor experiences. While a significant portion presently does not offer or plan to offer a visitor experience, there is a notable number that either currently does, or has plans to, provide such experiences. There may therefore be an opportunity to develop specific training on food visitor attractions for the region.

This diversity suggests different business models and strategies within the sector. For those with visitor experiences, it can be an avenue for engaging with the public, potentially contributing to local pride and national awareness as discussed earlier. Understanding the motivations behind offering or not offering visitor experiences could provide insights into the broader marketing and business strategies employed by these entities.



**Question 24:**  
**Are you aware of the Midlands Ireland Regional Food & Drink Producers Directory?**

The majority of respondents are aware of the Midlands Ireland Regional Food & Drink Producers Directory, indicating a notable level of awareness and engagement within the surveyed group. This awareness is positive, suggesting that these businesses have access to a regional directory that could potentially serve as a platform for collaboration, networking, and promotion of their products. The few respondents who are not aware may benefit from discovering and utilising such a directory, enhancing their visibility and connections within the regional food and drink community. Overall, the awareness of this directory among the surveyed businesses aligns with the collaborative spirit suggested in earlier responses, emphasising the potential for shared resources and networking within the Midlands region.



**Question 25:**  
**Do you have any final thoughts or suggestions on attracting and retaining food industry talent in the region?**

4 respondents (44%) answered **needs** for this question.



The final open question responses highlighted various perspectives on attracting and retaining food industry talent in the Midlands region. Some suggestions include recognising the region as an area of disadvantage, similar to Gaeltacht areas, emphasising fair compensation, and promoting the Midlands food scene more extensively to a national audience.

Education is identified as a key factor, with a call to start at a young age. This aligned with the interviews which called for promotion of the subjects related to the industry at second level.

Additionally, there was a suggestion to incorporate food and drink experiences with tourism initiatives and showcase Midlands' products at events.

The diversity of suggestions indicates the complex nature of talent attraction and retention, involving economic, educational, and promotional aspects. Collaborative efforts between local businesses, educational institutions, and tourism departments could potentially enhance the overall appeal of the Midlands as a hub for food industry talent.





## Discussion and Recommendations

# Discussion and Recommendations

Eight recommendations are drawn from the data analysed, including from the academic literature, policy materials, case studies, interviews and surveys. These are presented below and discussed in turn. There is a clear need to have a dedicated regional resource such as a Regional Food & Drink Programme Manager to ensure that the recommendations are progressed.

- 1. Design and deliver a LEARNING JOURNEY for influential stakeholders from the Midlands region to visit and learn from a good practice destination. This could be, for example, to a region with similar characteristics to the Midlands that has successfully developed an international reputation for its food and drink industry. Learning would comprise site visits, meetings, presentations and training from the host destination. Funding streams to be identified.**

The report strongly recommends assembling a team of influential stakeholders from the region to participate in regular learning journeys to good practice destinations in Ireland and across Europe. We envisage that these would encompass site visits, meetings with experts and learning transferable ideas of scale which would benefit the region. For example, a visit to Emilia Romagna in Italy, would allow participants to meet 1) established craft producers who are responsible for the food culture and regional reputation, 2) legal experts who have developed protections for EU designations for foods such as Prosciutto di Parma ham and Parmesan cheese, 3) large scale manufacturers, 4) tourism policy makers, 5) food and drink support services, 6) education professionals, 7) retailers. We suggest to seek Erasmus funding to support this.

- 2. Establish a CENTRALISED WEBSITE promoting all available food related courses in the region. This would not contain a database or live links, as this would be challenging in terms of ongoing updates, but rather a compendium of all providers and samples of their courses. Suggest that this be hosted by Midlands Regional Food and Drink Directory.**

Interviewees variously suggested good provision of courses, over-provision of courses, under-provision of courses. Some providers of courses were not aware of others in the region, while some producers asked for courses to be offered which already run. It is clear therefore that there is a communication piece needed around skills and training provision. It therefore may be beneficial to write a short profile of each provider (E.g. the LEOs, University, ETBs, Skillnet, etc) and post these along with a link to the provider's course search page on one centralised website such as the Midlands Regional Food and Drink Directory. This would allow for one single source of information, rather than the current ad-hoc approach.

- 3. INVEST IN FOOD TOURISM PRIDE in the region – the analysis demonstrated a need to continue to develop and support pride in regional food products – this could be through ongoing courses, workshops, seminars, training events. Suggest that this activity is continued on an on-going basis between Fáilte Ireland, County Councils and Just Transition Activators.**

Interviewees repeatedly discussed food pride and food marketing in the interviews and the figures collected in the survey supported the argument that there is a disconnect between local food pride and national awareness of the quality of produce in the region.

- 4. Establishing additional MARKETS AND EVENTS in the region.**

As with the previous point, the need for investment in markets and events in the region is clear. SMEs and the regional figures show a really strong picture with large scale events such as the Fleadh, the National Ploughing Championships and Electric Picnic. However, there was desire among producers for further local sales channels and a belief that these would be to the benefit of the regional tourism industry and the night time economy.

- 5. Design and deliver, short and pointed TRAINING COURSES ON FOOD VISITOR ATTRACTION DEVELOPMENT. Low numbers of food SMEs offer visitor experiences in the region and this needs to be addressed to boost the range of activities in the region and the reputation and association between food and place.**

SMEs in the survey highlighted that very few food visitor attractions exist or are co-located with food production or retail. This is an opportunity to develop for the region. Training on business development opportunities to diversify revenue streams is required to make this successful. A positive outcome would be an increased number of food sales businesses offering visitor experiences. Drumhambo in Co. Leitrim, or a site visit to the Burren Food Circle could act as an ideal case study of a successful venture in this space.

- 6. Develop a SHORT-ADVANCED PROGRAMME (SAP) on The Future of Food in Regional Europe led by Technological University of the Shannon in conjunction with local industry and TUS' RUN-EU partners.**

Short Advanced Programmes in TUS and in collaboration with RUN-EU range from one to eight weeks and combine on-campus activities with equally meaningful online sessions. The programmes typically combine interdisciplinary learning units at more than one European university and are focussed on a micro issue. The Future of Food in Regional Europe would provide an ideal opportunity for businesses in the region to benefit from expertise across our network through local access to international knowledge.



**7. Fund A POST-GRADUATE RESEARCH STUDENT - Support post-graduate research in food and drink policy development in the Midlands region through funding a collaborative research project between a regional authority in the sector, TUS and RUN-EU partners.**

At present there is no post-graduate research in the local university on food policy in the region. We believe this is not a sustainable position for the local industry if it wishes to thrive. There are national challenges around post-graduate research funding and funding streams for this project are to be identified. However, the report argues that without ongoing research into policy needs, skills needs, tourism challenges, and sustainability issues, it will be challenging for this sector to thrive.

**8. RETAIN EXISTING PROVISION OF FOOD AND DRINK RELATED SKILLS PROGRAMMES in the region even during a low demand cycle**

Despite the national shortage in chefs, the international demand for tourism and rising prices and revenue in the sector, there continues to be low levels of interest globally in courses related to culinary arts and hospitality and tourism. We need to continue to support and invest in the development and promotion of food related courses in the region at all QQI levels despite the decline.







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# Appendices





# Appendix 1 – Participant Information Sheet and Informed Consent Form

## Sample questions included

### Midlands Regional Food and Drink Strategy – Skills Need Assessment

The Midlands Food and Drink Strategy has been developed in response to an identified need for a collaborative, cross-sector approach to deliver a sustainable and resilient food and drink eco-system in the Midland Region, comprising Laois, Longford, Offaly and Westmeath.

The strategy has the sustainability agenda at its very core, whilst seeking to overcome the many challenges faced by the sector. One of the key findings was the need to survey relevant companies to assess the skills gaps in this sector.

Through a primary qualitative phase, we will engage with key stakeholders and experts to identify the main trends and drivers impacting skills requirements over the next decade. By conducting structured interviews and surveys with at least 15 Food and Drink enterprises and 10 key informants, including sectoral representative organisations, we will gather insights into the specific skills gaps that need to be addressed.

#### Scope of Work:

- Identify Skills needs of companies in the Food & Drink sector in the Midland counties
- Desk Review
- Primary Qualitative Phase
- Primary Survey Phase
- Particular attention should be paid to research on the skills needs of Midland companies.

Please read this document carefully before deciding to participate in this study.

#### Implications of Participation

Participating in this project will involve responding to a brief open interview with some profile information. The idea is that all participants can elaborate how they observe trends, skills and labour market needs in the region.

#### Duration

The interview will have a duration of 20 minutes.

#### Risks and Benefits

There are no risks of any kind associated with your participation.

#### Compensation

There is no compensation planned for your participation, although you may receive, if desired, a brief report on the overall responses, as well as updates on the research. For this purpose, an email address will be requested. However, providing an email address is not mandatory to participate in the study; it is only required if you wish to receive this information.

#### Confidentiality

If you decide to participate, your involvement will be confidential, and only the research team members will have access to the project data. The fact that you have participated will not be disclosed to third parties. The researchers will keep this informed consent in a secure location and will destroy it after 5 years following the completion of the research. Once the study is completed and the data has been analysed, it will be anonymised and made available to other interested researchers.

#### Voluntary Participation

Participation in this study is voluntary. There will be no penalty for not participating.

#### Right to Withdraw from the Study

You have the right to withdraw from the study at any time without providing explanations and without negative consequences. You can simply exit the interview, and your data will not be recorded. Additionally, if desired, you can exercise your rights recognised by the European Regulation on the Protection of Personal Data by contacting Dr Anthony Johnston (Anthony.johnston@tus.ie). Additionally, if desired, you can exercise your rights recognised by the European Regulation on the Protection of Personal Data by contacting Dr Anthony Johnston (Anthony.johnston@tus.ie).

You also have the right to file complaints with The Data Protection Commission of Ireland: <https://www.dataprotection.ie/>.

In any case, you will receive a written response regarding the action taken within the legally established timeframe.

#### Use of Data

The data will be kept as long as necessary for the purposes of the processing and to address any potential liabilities that may arise, without prejudice to the exercise of the rights recognised by the Regulation (EU) 2018/1725 for the data subjects. After the completion of the project, these data may be made available to other researchers in an anonymised form.

The processing of your data does not involve automated decision-making or profiling for predictive purposes of personal preferences, behaviours, or attitudes.

#### Consent

1. I authorise the recording (audio and/or video) of the discussion for research purposes.

Yes  No

2. I authorise the use of literal quotations from my contributions without mentioning data that can identify me.

Yes  No

3. I have read the information about the research project and have had the opportunity to ask questions (if asked, they have been satisfactorily answered).

Yes  No

4. I understand that the anonymised information (without personal identifiers) from this project will be made available to other researchers after the project is completed.

Yes  No

5. I agree to participate and have received a copy of this consent form.

Yes  No

#### Participant's Name and Surname:

Signature:

Date:

#### Researcher:

Signature:

Date:

## Appendix 2 – Sample Interview Questions

1. Can you provide an overview of your company's role in the Midlands food and drink industry, and how it has evolved over the years?
2. What specific challenges or obstacles has your company faced in terms of skills and workforce development within the sector?
3. How do you perceive the impact of the Midlands Food and Drink Strategy on the overall sustainability and resilience of the regional food and drink ecosystem?
4. In your opinion, what are the key drivers or trends that will shape the skills requirements in the food and drink industry in the Midlands over the next decade?
5. Could you identify any particular areas or skill sets where your company has experienced shortages or skills gaps, and how have you addressed them?
6. How important is sustainability to your company, and what measures or initiatives have you implemented to align with the sustainability agenda of the strategy?
7. Can you discuss any collaborations or partnerships your company has engaged in to foster a cross-sector approach in the food and drink ecosystem in the Midlands?
8. From your perspective, what role do sectoral representative organizations play in addressing skills gaps and supporting the industry's growth in the region?
9. What recommendations or strategies do you think would be effective in addressing the identified skills gaps in the Midlands food and drink sector?
10. How do you see the Midlands Food and Drink Strategy benefiting the community and the regional economy as a whole, beyond just the industry?

## Appendix 3 – DEIS Schools in Region

Primary Urban Band 1	Primary Urban Band 2	Secondary
1. Scoil Naomh Micheal	1. S N OSMANN	1. St. Mel's College
2. PRESENTATION CONVENT (JNR)	2. Corr na Madadh N S	2. Meán Scoil Muire
3. MERCY PRIMARY SCHOOL	3. Scoil na mBraithre	3. Castlepollard Community College
4. St Josephs Girls N.S.	4. S N Proinsias Naofa	4. Columba College
5. St Fintans N S	5. SCOIL CHOLMAIN NAOFA	5. Mullingar Community College
6. St Peters N S Snr	6. Scoil na gCeithre Maistri	6. Portlaoise College
7. ST BRENDANS MONASTERY	7. ST MARYS N.S.	7. Ballymahon Vocational School
8. ST. JOHNS NATIONAL SCHOOL	8. Scoil Bhríde Primary School	8. Ardscoil Phadraig
9. CLARA CONVENT N S		9. Lanesboro Community College
10. Scoil Bhríde		10. Templemichael College
11. Mountmellick Boys N S		11. Ard Scoil Chiarain Naofa
12. SN Deaghan O Ceallaigh		12. Oaklands Community College
13. S N NAOMH PHILOMENA		13. Tullamore College
14. SCOIL MHUIRE		14. Mountmellick Community School
15. St Joseph's Convent		15. St.Brendan's Community School
16. Scoil na Maighdine Mhuire		
17. St Patrick's National School		
18. S N Phoil Naofa		
19. S N NAOMH BRIGHDE BUACH		
20. St. Joseph's N.S.		
21. Arden Boys NS		
22. Scoil Bhríde NS		
23. St Emer's National School		
24. ST MARYS NS		
25. Gaelscoil An Longfoirt		
26. The Sacred Heart Primary N.S.		
27. Mullingar Educate Together NS		

Table 12: DEIS Schools in the Midlands



## Appendix 4 – Ethics



**Technological University of the Shannon:  
Midlands Midwest**

Ollscoil Teicneolaíochta na Sionainne:  
Lár Tíre Iarthar Láir

18 December 2023

Dr Anthony Johnston

**Re: Midlands Regional Food and Drink Strategy – Skills Need Assessment**

Dear Anthony

The Committee has reviewed your resubmission and has approved same.

We wish you the best of luck with your research.

Kind regards

**Mary McDonnell Naughton**

**Chair – Research Ethics Committee**

## Appendix 5 – Survey

# Enhancing Skills for the Future of Food and Drink Production in the Midlands, Ireland

Thank you for participating in our survey. Your input is essential in shaping the Midlands Food and Drink Strategy to address skills gaps and enhance sustainability in the sector.

This survey should take approximately 10 minutes to complete. We are particularly targeting SME owners and those in management and decision-making roles in food and drink companies in the region.

The Midlands Food and Drink Strategy was developed in response to an identified need for a collaborative, cross-sector approach to deliver a sustainable and resilient food and drink eco-system in the Midland Region, comprising Laois, Longford, Offaly and Westmeath. The strategy has the sustainability agenda at its very core, whilst seeking to overcome the many challenges faced by the sector. One of the key findings was the need to survey relevant companies to assess the skills gaps in this sector.

Please read this document carefully before deciding to participate in this study.

### Implications of Participation

Participating in this project will involve responding to a brief open interview with some profile information. The idea is that all participants can elaborate how they observe trends, skills and labour market needs in the region.

### Duration

The survey will take no more than 10 minutes to complete.

### Risks and Benefits

There are no risks of any kind associated with your participation.

### Compensation

There is no compensation planned for your participation, although you may receive, if desired, a brief report on the overall responses, as well as updates on the research. For this purpose, an email address will be requested. However, providing an email address is not mandatory to participate in the study; it is only required if you wish to receive this information.

### Confidentiality

If you decide to participate, your involvement will be confidential, and only the research team members will have access to the project data. The fact that you have participated will not be disclosed to third parties. The researchers will keep this informed consent in a secure location and will destroy it after 5 years following the completion of the research.

Once the study is completed and the data has been analysed, it will be anonymised and made available to other interested researchers.

Additionally, if desired, you can exercise your rights recognised by the European Regulation on the Protection of Personal Data by contacting Dr Anthony Johnston (Anthony.johnston@tus.ie).

1. Where is your company based?\*

- Laois
- Offaly
- Longford
- Westmeath
- More than 1 Midlands County

2. How many people work in your company?\*

- 1 - 9 employees
- 10 - 49 employees
- 50 - 249 employees
- 250 employees +

3. How many years has your company been operation in the food and drink sector?

- Less than 1 year
- 1 year to 5 years
- 5+ years
- Unsure

4. What sector is your company involved in? Please tick all that apply

- Dairy
- Meat
- Baking, pastry and desserts
- Ingredients / additives
- Beverages (alcohol)
- Beverages (non-alcohol)
- Fish
- Horticulture
- Food retail
- Food tourism
- Organic Foods
- Cookery School
- Support Services
- Prepared Foods
- Preserves
- Confectionary
- Other (please specify)

5. When you seek to employ new staff, or upskill existing staff, please rank the below in terms of importance in what you seek to find or improve.

	Not At All Important	Not Very Important	Neutral	Relatively Important	Very Important
Digital Literacy and Technology Skills					
Marketing					
Sales					
Food Safety and Quality Assurance					
Management					
Soft skills, including emotional intelligence					
Supply Chain Management					
Food Science					
Robotics and Automation Experience					
Human Resources Management					
Nutrition and Health Expertise					
Culinary Skills					
Food Product Development					
Packaging					
Sensory Analysis					
Horticulture					
Sustainability skills/ ethos					



6. What specific skills do you find most crucial for your employees in the food and drink sector?

7. Have you faced challenges in recruiting employees with the required skills in the past 12 months?

- Yes
- No
- Not Sure
- Not Relevant

8. If yes, please specify the types of skills that were challenging to find

9. What strategies, if any, has your company employed to address skills gaps (e.g., training programs, partnerships with educational institutions, contractors)?

10. Please self-evaluate your company's current sustainability practices in the food and drink sector. (1 star - poor, 2 below average, 3 Average, 4 Good, 5 Excellent)



11. What sustainability initiatives is your company currently implementing? (Select all that apply)

- |   |   |
|---|---|
| <input type="checkbox"/> Local sourcing of ingredients    | <input type="checkbox"/> Renewable energy measure   |
| <input type="checkbox"/> Waste reduction and recycling    | <input type="checkbox"/> Organic Practices          |
| <input type="checkbox"/> Energy efficiency measures       | <input type="checkbox"/> Circular Economy Practices |
| <input type="checkbox"/> Eco-friendly packaging materials | <input type="checkbox"/> None at Present            |
| <input type="checkbox"/> Packaging reduction              | <input type="checkbox"/> Other                      |
| <input type="checkbox"/> Packaging return schemes         |   |

12. What challenges, if any, have you encountered in implementing sustainable practices in your company?

13. What support or resources do you think would be beneficial for your company to address sustainability skills gaps?

14. Have you (personally) undertaken any upskilling in the food and drink sector in the past 2 years?

- Yes
- No

15. If yes, please specify what course/ training you undertook.

16. Do you expect your company employee numbers to grow in the next 2 years?

- Yes
- No

17. What skills or training do you plan to provide or source in the next two years?  
(please tick all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> Food Safety Training    | <input type="checkbox"/> Soft Skills Training                              |
| <input type="checkbox"/> Sustainability Training | <input type="checkbox"/> Legislation                                       |
| <input type="checkbox"/> Food Science/ Quality   | <input type="checkbox"/> Customer Care/ Retail                             |
| <input type="checkbox"/> Robotics/ Automation    | <input type="checkbox"/> Sales and marketing (including digital marketing) |
| <input type="checkbox"/> Artificial Intelligence | <input type="checkbox"/> No plans at present                               |
| <input type="checkbox"/> VR/ XR                  |  |

18. Would your company be interested in collaborating with other SMEs, educational institutions, or industry bodies to address common challenges in the food and drink sector?

- Yes
- No

19. If yes or maybe, please specify the type of collaborations your company would be interested in:

20. How would you rate local pride in Midlands food and drink industry?  
1 being very negative, 5 being very positive. \*



21. How would you rate national awareness of the Midlands food and drink offering? \*



22. What additional upskilling or training courses would you like to see offered in the Midlands region in relation to food and drink production?

23. Does your business premises currently or plan to offer a visitor experience? \*

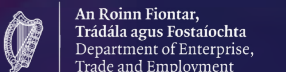
- Yes
- No

24. Are you aware of the Midlands Ireland Regional Food & Drink Producers Directory?

- Yes
- No

25. Do you have any final thoughts or suggestions on attracting and retaining food industry talent in the region?







 [WWW.MIDLANDSIRELAND.IE](http://WWW.MIDLANDSIRELAND.IE)

 [MIDLANDSIRELAND-IE](https://www.linkedin.com/company/midlandsireland-ie)

 [@MIDLANDSIRELAND](https://twitter.com/MIDLANDSIRELAND)

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An Roinn Fiontar,  
Trádála agus Fostaíochta  
Department of Enterprise,  
Trade and Employment