



FOOD AND THE CITY







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Food and the City

The Employment and Economic Development Potential of
the Food Sector for Dublin City
A Discussion Document
March 2011

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In downtown Dongguan, Chinese workers are chomping noodles from Kitsunoodle bars, a concept devised in Dublin.

The Irish food and drink industry is Ireland's most important indigenous sector, employing 106,000 people, with a turnover approaching €24 billion. It accounts for two thirds of all indigenous exports and total exports this year will exceed 7.5bn euro.

A food sector that is diverse, robust and vibrant will provide a rich range of employment opportunities, and generate income in a variety of ways.

Tourism is one of the world's fastest growing industries, and its potential for the Irish economy is very significant. As a labour intensive sector, it has a strong role to play in employment creation across a range of skill levels.



Diverse Food Sector



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1.0 Introduction

The food enterprise/tourism sector is critically important for the city (and the city has an important role in delivery of national objectives in these areas):

- As a source of employment and economic growth
- Making the city more attractive for residents, visitors and workers
- And generally enlivening the city (e.g. pavement cafes and 'street food'). South William Street area is probably the most successful example of the transformation of an area by decisions of entrepreneurs and consumers.
- The significantly improved quality of our food provision is increasingly highlighted in guide books and reviews in international papers.
- Diverse food shops and cafes can be seen as a means of integration, learning about different cultures and ethnic groups through each others foods.
- Marketing the city internationally (e.g. Barrow Street Spar used as model of good practice for Spar globally, see <http://www.sbpost.ie/newsfeatures/spreading-its-branches-52153.html>)
- Regeneration potential, e.g. Capel Street, Thomas Street, previous shop units that are too small for retail now are viable as cafes/restaurants
- Guinness Storehouse is our biggest visitor attraction nationally.



Food Enterprise



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The new Dublin City Development Plan has put new supportive policies in place for the foodsector as well as a strong emphasis on economic development and employment generation in the “Revitalising the City's Economy” chapter. There is also a renewed focus on the food sector at national and regional level and also a variety of private sector initiatives. The purpose of this draft document is to generate discussion and a co-ordinated response to optimise the opportunities in this sector.



Food Enterprise

¹ <http://www.sbpost.ie/newsfeatures/spreading-its-branches-52153.html>

² London Development Agency, Healthy and Sustainable Food for London.

³ Dept. of Enterprise, Trade and Innovation; Trading and Investing in a Smart Economy



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2.0 Current Opportunities

There are significant opportunities currently partly arising from the sharp drop in rents/land values. Tesco, Aldi, Lidl, Nandos (<http://www.nandos.com/>), McDonalds and others are looking at new developments in the city. This is a form of Foreign Direct Investment into the city. However, these companies often have particular requirements arising from their business model/experience which they see as central to their investment decisions.

Foreign investment in the retail food area can have very positive other benefits. For example, “The Blas na hÉireann/Irish Food Awards have taken place in Dingle, and medals were awarded to the best of Irish produce. Aldi scooped 12 awards for their products.” <http://www.irishfoodawards.com/>



Opportunities



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3.0 Sub-sectors

There are a number of relevant sub-sectors;

- ☐ Markets (indoor and outdoor) are increasingly popular. The Events Section of City Council provides support for these initiatives.
- ☐ Cafes/restaurants
- ☐ Processors in city such as Guinness, Cadburys, Blenders, Hanlons, Granby, Spade enterprise centre and others
- ☐ Grocery shops; supermarkets, speciality, convenience, and ethnic shops. It is generally regarded that the lack of good quality grocery shopping in the city is an issue.
- ☐ Wholesalers
- ☐ Dublin –based food research and education centres such as DIT, UCD, BIM, Teagasc, Griffith College, private companies and others. It is interesting to note, however, that the last major food innovation in Ireland was Baileys.
- ☐ Visitor attractions such as Guinness Storehouse, Jameson, Temple Bar food market, and Dublin City Council's Fruit and Vegetable Market which could be a visitor attraction in the future.
- ☐ Food to go/'take-aways' (e.g. www.blazingsalads.com)
- ☐ Catering; e.g. www.artizanfood.ie
- ☐ Pubs



sub-sectors



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4.0 Policy

There is increasing emphasis being placed on these 2 sectors; Food and Tourism; at national level, see for example *Trading and Investing in a Smart Economy* (DETI).

Faillte Ireland have published a *National Food Tourism Implementation Framework 2011-2013*. It states that:

Food tourism is a growing market segment internationally and many tourist destinations are developing this important sector as a means of gaining competitive advantage

As set out above, the new City Development Plan has very positive policies for this sector such as: the promotion of outdoor markets (Policy RD6); the promotion of market streets (Policy RD15); facilitating ethnic restaurants/shops on Parnell Street and Capel Street (Policy RD16); facilitate City Markets project (Objective RDO3); promote supermarkets and convenience shopping (Policies RD 24 and 25); promote competition and innovation (Policy RD27). There is Policy (RE10) in the new Plan “to promote and facilitate the economic and employment generating potential of the locally traded services sector” (including restaurants, cafes etc) and an Objective (REO6) to prepare a report and recommendations. In addition, the policy on Category 1 shopping streets has been amended to give recognition to the dynamic nature of food in the provision of services in the city.



Tourism Strategy



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The Lord Mayors Commission on Employment report has recommendations on these issues. It is one of the objectives (2.4) of the *Economic Development Action Plan for the Dublin City Region* to identify measures to promote and support key economic growth sectors/clusters in the Dublin City Region such as food.

Ireland by 2016 could set itself the goal of becoming the most efficient, most highly innovative food and drink country in the world, according to a recent report entitled 'Pathways for Growth' prepared for Bord Bia by Professor David Bell and Mary Shelman of the Harvard Business School.

Dublin is critical to delivery of national objectives:

- ☐ It is the biggest consumer market for our food producers nationally,
- ☐ Dublin is an ideal place to test new products/innovations.
- ☐ Visitor attractions such as Convention Centre and City Council Fruit and Vegetable Market could be used as way to showcase Irish produce.

Cities such as London and New York have published food strategies recently.



Tourism Strategy



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5.0 Initiatives

We have particular great resources/innovators in Dublin such as our convenience stores with their global reach:

Spar Ireland's role in the international organisation includes the showcasing of convenience stores such as the Eurospar on Barrow Street for global retailer visits, and the development in BWG offices here of the Kitsu concept, and Treehouse smoothie bars, that are then exported.

"The convenience store model in Ireland is among the top worldwide, and that is why - in the last 18 months - we have had visits from Spar Holland, Spar Saudi Arabia, Spar India and Spar China," Leo Crawford

There is a need for planning to be responsive and accommodating to these constant innovations in this service sector, such as the development of grocery stores that are also cafes and also have a 'food to go'/take-away (hot and cold food) elements, with off-licence (e.g. Fallon and Byrnes). However, it is equally important to ensure high quality outcomes that are in accordance with the proper planning and sustainable development of the area.



Constant Innovation

⁴ See also Forfas, *Catching the Wave; A Services Strategy for Ireland*.

⁵ <http://www.sbpost.ie/newsfeatures/spreading-its-branches-52153.html>



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Dublin City Councils Business Support Unit provides information on, and co-ordinates access to the range of Dublin City Council services that are required for setting up or growing a business.

<http://www.dublincity.ie/Planning/EconomicDevelopment/Pages/BusinessSupportUnit.aspx>

New York City Council has set up a New Business Acceleration Team to support food enterprises, see <http://www.nyc.gov/html/nbat/html/home/home.shtml>

Dublin Food Chain, launched in February 2011, is a joint initiative of the Irish Exporters Association and the four County and City Enterprise Boards in the Dublin Region. The objective is to research and pinpoint the key challenges facing the small producers, distributors and retailers in the food sector in the Dublin region and to develop a support network where the various players can work together to develop a sustainable local economy and build export contribution.

There is a general agreement that there has been great increase in the quality and provision of our cafes/restaurants increasingly highlighted by the **tourist guide books:**

the combination of high-quality local produce and friendly service makes dining out here a relaxed, unstuffy pleasure at any level
Wallpaper* City Guide: Dublin

The travel bible of the French-speaking world, Le Guide du Routard, has pronounced Irelands restaurants unmatched for quality, value and service. Sunday Times 9.1.11



Friendly service



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As ever, the fine dining sector is working hard (Dublin is a paradise of stellar eateries for those who have the time and funds) .. but the good news is that the casual neighbourhood restaurants are starting to raise standards, attracting praise from both critics and consumers. Time Out Guide to Dublin 2009

The Dubliner 100 Best Restaurants shows strong clustering of these best restaurants in South William/Georges Street, and Merrion Row environs. There is also a good clustering around Capel Street and Parnell Street.

The **Lord Mayors Commission on Employment** final report highlighted that street/café culture 'has become such a dynamic and attractive part of our city in recent years ... and should be encouraged'. Outdoor seating is a central part of this attractiveness and well-designed high quality canopies are an intrinsic part of this contribution (especially in our climate). Canopies are also part of the street heritage (as can be seen from historic photographs) when they were used as a way of shielding perishable produce from the sun. Of course care has to be taken that such canopies do not detract from the character of the street for example in an Architectural Conservation Area.

Street Markets: Dublin City Council is currently considering the designation of a number of new sought after street trading locations with earning potential. To this end, a sub-committee of the Arts, Culture, Leisure and Youth Affairs Strategic Policy Committee has been formed to discuss and review the Casual Trading Bye-Laws 2003. Part of this review is to identify and include additional trading locations around the city. Expressions of Interest were invited from applicants with an interest in trading from pitches at the potential new designated trading locations. The closing date for receipt of Expressions of Interest was **25th February 2011**. (www.dublincity.ie)



cafe culture



FOOD AND THE CITY

And there is an increasing interest in food events in the city such as <http://www.tasteofchristmas.ie/> and others.

“Over 70,000 people visited this unique free Bavarian event in George's Dock in the IFSC. Experience traditional German fun, food and entertainment.”
<http://www.oktoberfest-dublin.com/>

There is also a positive trend of including food in other events such as Culture Night and Africa Day. “One of the joys of Culture Night in Dublin, according to those who run it, are when quiet corners of the city come alive with noise and people. This year there may well be the sizzle of paella, barbecues and meatballs, cooked, served and eaten in the fresh air of a Dublin September night (weather permitting). A last taste of summer before autumn takes hold. The night also offers the chance for people to have dinner in cafes that usually pull down their shutters in the late afternoon.” *Pitstops for culture vultures*: Catherine Cleary, Irish Times.
<http://www.irishtimes.com/newspaper/magazine/2010/0918/1224278823590.html>

There is a range of very positive private sector initiatives such as <http://www.fabfoodtrails.com/> “Our Dublin Tasting Trail walks reflect all that is best on the contemporary Irish table and in our shops as we wander through the lesser known parts of the city, tasting as we go.”



cafe culture



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And restaurants have collaborated in initiatives to attract more customers such as the 'dine in Dublin' initiative <http://www.dineindublin.ie/>

Food plays a central role in the lives of all of London's communities. Furthermore, much of London's appeal is due to the broad array of cuisines that the city offers, making food an important element of London's tourism offer.

In a lyrical and moving article on ethnic restaurants in Dublin, “**Savouring the taste of home**”, Ken Doherty shows how for many immigrants, the connection to their culture and traditions is kept alive through the prism of food.

Approaching Adnan Hameed's Madina restaurant on Mary Street, thoughts of national identity and how food plays a part in reviving it are obvious. Passing under its brightly lit neon sign, the unmistakably sweet and warming scent of spices gently fills the small dinning room. For Hameed and his family, it must smell just like home. This search for a sense of place and identity through food is echoed across the city.

Our multi-cultural population and the **diversity** of our restaurants/cuisines is also a great asset for tourism and the city in general. There is also the possibility of encouraging those multi-cultural operators to promote Irish food produce in their countries of origin. (e.g. www.kohinoor.ie; www.asiamarket.ie)



Tasting Trail



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Mercer Quality of Life Survey: Restaurants are part of the Recreation category in the Mercer Quality of Life. Dublin scores well – 9 out of 10 – on choice and availability of variety of cuisines and top class restaurants.

Pubs are facing difficult times but those that are innovative/responsive seem to be doing well, with ones like Porterhouse going international with outlet at Shanghai Expo e.g. <http://www.porterhouseireland.cn/index/521>. And ones like the Bernard Shaw having an international renown for music/events, and include food, www.bodytonicmusic.com

Eately is a very successful market operator first in Turin and later in a number of other cities and most recently New York, <http://eatalyny.com/#1>, similar initiatives could be encouraged in Dublin.

Bord Bia Marketing Fellowship: UCD Michael Smurfit Graduate Business School, in partnership with Bord Bia, run a 12-month action learning programme giving students the combined opportunity to gain hands-on experience working with some of Ireland's most respected food companies and also gain a postgraduate qualification. Participants' time is split between working in foreign locations, supported by Bord Bia, and studying for an MSc in Marketing Practice at UCD Smurfit School.

Enterprise Ireland/Bord Bia/Superquinn Supplier Innovation Development Programme This is a cooperative venture between the State Agencies and Superquinn, which is designed to support small or emerging food processing companies achieve the service standards, product quality, and innovation necessary to achieve product listings from retail multiples such as Superquinn. Five of the twelve participants in the recent programme were from Dublin: Kohinoor Foods, Natasha's Living Foods, Couverture Desserts, Sushi King, and Deliciously Different Cake Company all of Dublin.



Tasting Trail

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6.0 Competition

The EU/IMF *Programme of Support for Ireland* (see p14) states that to encourage growth in the retail sector the Government “**will**” conduct a study of the economic impact of eliminating the cap on retail premises with a view to enhancing competition and lowering prices for the consumer, and discuss implementation with the Commission services.

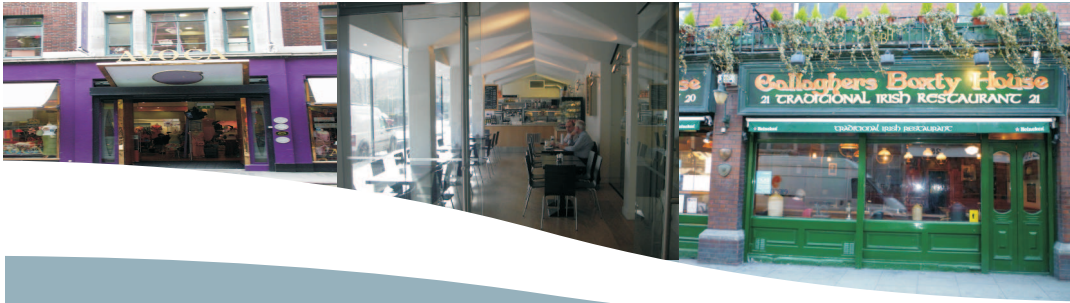
This could be positive or negative for the City Council area in terms of attracting retail investment. Consideration might be given to developing a submission to Government that would be in the best interests of the city, competition, the consumer, and growth in the retail sector.

Irish food prices are 29% higher than the average in 27 EU countries, according to Eurostat figures published earlier this year.

A series of Competition Authority studies “found that the retail planning system made it difficult for new retailers to enter the Irish grocery market and existing retailers to expand. This is because the planning system can influence the type of grocery retailers, where they locate, what they offer consumers and the prices that consumers pay.”



Enhancing Competition



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All seven recommendations, to promote competition in grocery retailing in Ireland, were directed to the Department of the Environment, Heritage and Local Government. The Department will consider the recommendations in its review of the Retail Planning Guidelines.

A list of the priority recommendations not yet implemented is set out by the Competition Authority as follows:

- ☐ Local Authorities should be required to include an assessment of competition in “health checks” of local development plans
- ☐ The Retail Planning Guidelines should explicitly recognise the benefits of competition from new retailers for consumers
- ☐ Local authorities should be required to formally survey consumers regarding attitudes and preferences



Promote Competition



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7.0 Food Poverty

Up to 15% of the population is unable to have an adequate and nutritious diet, with 30% of poorer families affected according to research by the Food Safety Authority of Ireland and the Healthy Food for All initiative. Where people can shop has a big bearing on the affordability of a healthy diet. A discount store is on average 16% cheaper than a multiple supermarket. Convenience stores are twice as expensive as supermarket multiples. They recommend that:

“Access to the cheaper grocery outlets should be improved for low-income households. This can be addressed through the revision of retail planning guidelines and by enhancing local transport systems. “

There is a general problem in the city of getting sites large enough for modern supermarket footplates and this is recognised in the new Plan and in the Retail Planning Guidelines for the Greater Dublin Area.

New York and other cities have similar problems and NY City Council has carried out studies of areas underserved by grocery stores, identifying barriers and problems and has set up the FRESH programme to promote the provision of grocery stores including through more responsive planning.



Affordability



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8.0 Proposals

1. Recognise the great employment and economic development role and potential of the food sectors for the city. And making the city a great place to live, visit, work and invest in.
2. Continue the work of including a retail element in the Fruit and Vegetable Market to provide a major visitor attraction and a showcase for Irish produce.
3. Consider the use of the Daisy market for food sales seven days a week
4. Continue to take a positive planning approach to proposals from the various food sectors.
5. Promote Temple Bar food market links to markets north of river and Capel Street
6. Consider a Food Innovation competition/event; either a product or service
7. Develop a marketing programme including a calendar of food related festivals over the year in Dublin
8. Decide on message; such as “Great Produce: Diverse/World Cuisines”.



Market Attraction



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9. Support proposals for 'street food retailing' at the locations set out in Review of Casual Trading Bye-Laws.
10. Consider how to promote the Dublin Food Chain initiative and food entrepreneurs in general.
11. Consider how visitor attractions such as the Convention Centre Dublin and City Council Fruit and Vegetable Market could be used as way to showcase Irish produce (link in with Bord Bia and others)
12. Arising from the EU/IMF *Programme of Support for Ireland*, the City Council could develop a submission to Government on retail and competition issues.
13. Hold a seminar on these issues inviting all the stakeholders to discuss challenges, opportunities and possible actions.
14. Consider the development of a Dublin Region Food Strategy.



Market Attractions

Appendix : Resources

Bord Bia, *Pathways for Growth; Progress Update*, November 2010
Bord Bia, *'Pathways for Growth'* (Professor David Bell and Mary Shelman of the Harvard Business School)
City of Melbourne; *Melbourne Hospitality Strategy 2008-2012*
Competition Authority, various reports on grocery sector and submission to DOEHLG on retail and planning policy.
Dept. of Agriculture, *Food Harvest 2020*
Doherty, Ken; "Savouring the taste of home"; Metro Eireann, February 12th 2009,
<http://metroeireann.com/article/savouring-the-taste-of-home,1669>

Dept. of Enterprise, Trade and Innovation; *Trading and Investing in a Smart Economy*
Dublin City Council, *Business Support Unit*,
<http://www.dublincity.ie/Planning/EconomicDevelopment/Pages/BusinessSupportUnit.aspx>
Dublin City Council Development Plan 2011-2017
Dublin Civic Trust and Dublin City Business Association, *Capel Street and the City Markets*.
Dublin Food Chain, contact Greg Swift, CEO, Dublin City Enterprise Board, tel. 6351144, email gswift@dceb.ie
Economic Development Action Plan for the Dublin City Region (2009)
Expert Group on Future Skills Needs, *Skills Requirements of the Food Sector*
Expert Group on Future Skills Needs, *Skills Requirements of the Wholesale and Retail Sector*
Failte Ireland, *National Food Tourism Implementation Framework 2011-2013*
Food and Drink Industry Ireland (FDII), various reports



wwwwebsites

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Forfas, *Catching the Wave; A Services Strategy for Ireland*.
Indecon, *The Economic Impact of McDonald's Restaurants in Ireland*
Guide de Routard, http://www.routard.com/guide/code_dest/irlande.htm
London Development Agency, *Health and Sustainable Food for London*,
<http://www.london.gov.uk/londonfood/useful-Information/food-strategy-implement-plan-07.jsp>

Lord Mayor's Commission on Employment: *Working city, Learning city, Creative city, Open city, Global city, Liveable city*.
National Consumer Agency; *Planning and Land Use and How it Affects the Consumer*

New York City Council Planning Dept., FRESH programme,
<http://www.nyc.gov/html/dcp/html/supermarket/index.shtml>

<http://www.nyc.gov/html/nbat/html/home/home.shtml>

Restaurant Association of Ireland, various reports

Other websites:

www.guinness-storehouse.com

<http://www.dublinfood.coop/>

<http://www.cheapeats.ie/>

<http://www.dublincitysoulfestival.ie/soul-food/categoryevents/6.html>

<http://www.kishfish.ie/>



wwwwebsites

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