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**Report Highlights:**

Top U.S. agricultural exports to the Republic of Ireland include soybean meal, distillers grains, forestry products, racehorses, and distilled spirits. In 2023, U.S. agricultural and related exports totaled \$669 million, a 5 percent increase over 2022. Opportunities for additional growth in the consumer-oriented sector include products with a focus on sustainability, health, and organic foods & drinks. This guide provides an overview of the market potential, consumer preferences and trends, food standards and regulations, and import and inspection procedures for U.S. exporters looking to better understand the Irish market.

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# Market Fact Sheet: Ireland

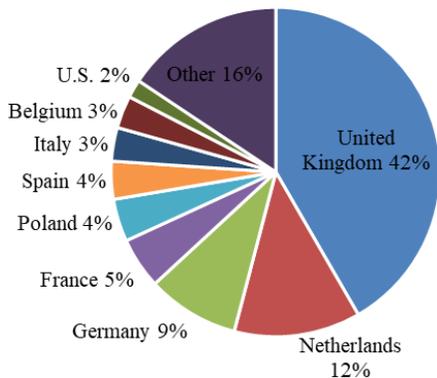
## Executive summary

Ireland ranks 40<sup>th</sup> in the world in terms of real gross domestic product (GDP), is export-oriented, and an open economy ([CIA World Factbook](#)). Ireland has created a business-friendly environment for multinational corporations, especially those from the United States. Additionally, foreign direct investment reduced Ireland's COVID pandemic-related economic shocks. Agriculture accounts for 1.2 percent of GDP. Ireland's key domestic agricultural commodities include dairy, barley, beef, wheat, and potatoes. Ireland is a net importer of fruits, vegetables, grains, and oilseeds ([Teagasc](#)). The United Kingdom (UK) is the top exporter of agricultural products to Ireland (Trade Data Monitor (TDM)).

## Imports of Consumer-Oriented Products

In 2023, Ireland imported \$8.93 billion in consumer-oriented products (TDM).

Consumer-Oriented Agricultural Products Imported into Ireland in 2023



## Food Retail Industry

The food retail sector is consolidated, competitive and increasingly dominated by low prices. Discount retailers such as Lidl and Aldi are growing their market share, challenging the dominance of the 'big three' supermarket chains (Dunnes, Tesco, and SuperValu). Key drivers in the Irish grocery retail market include cost/value, sustainability of products, online shopping, and health & wellness.

## Food Service Industry

The food service sector continues to recover post-pandemic. Higher cost-of-living for consumers is also negatively impacting the restaurant sector as food, drink and labor costs rise and consumer spending in this sector shrinks.

## Quick Facts CY 2023

**Imports of Consumer-Oriented Products: \$8.93 billion**

### Ireland's Top 10 Consumer-Oriented Growth Products

- |                            |                                   |
|----------------------------|-----------------------------------|
| 1) Chewing Gum & Candy     | 6) Spices                         |
| 2) Eggs & Products         | 7) Bakery Goods, Cereals, & Pasta |
| 3) Processed Vegetables    | 8) Fresh Fruit & Vegetable Juices |
| 4) Non-alcoholic beverages | 9) Chocolate & Cocoa Products     |
| 5) Distilled Spirits       | 10) Condiments & Sauces           |

### Food Industry by Channels (USD) 2023

Retail Food Industry	\$10.67 bn*
Food Service-HRI	\$8.98 bn
Food and Agriculture Exports	\$19.88 bn

### Ireland's Top Retailers, by Market Share as of Feb. 2024

- |                  |       |
|------------------|-------|
| 1) Dunnes        | 24.3% |
| 2) Tesco         | 23.5% |
| 3) SuperValu     | 20.6% |
| 4) Lidl          | 12.8% |
| 5) Aldi          | 10.9% |
| 6) Other Outlets | 7.8%  |

### GDP/Population

Population: 5.2 million  
 GDP: \$515.88 billion (2021 est.)  
 GDP per capita: \$102,500 (2021 est.)

Strengths	Weaknesses
Irish consumer trends mirror U.S. food trends and consumers are aware of U.S. brands and products.	Ireland is a relatively small market.
Opportunities	Threats
Lack of a language barrier eases operations for U.S. exporters and Ireland can serve as a gateway into European markets.	Geographic proximity and preferential tariffs provide advantages to food suppliers from the European Union (EU) and the UK.

Sources: TDM, Kantar, Ibec, CSO, [Bord Bia](#)

\*In 2018, the latest available data ([CSO](#))

Exchange rate: US\$1.00 = EUR0.92 (March 2024)

\*\*NOTE: Additional outreach is needed to provide an overview of the food processing sector in Ireland.

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## Section I. Market Overview

Since 1973, Ireland has been a member country of the European Union (EU) and European Free Trade Association (EFTA). The capital of Ireland is Dublin, and the next largest cities are Cork, Limerick, and Galway. Based on available data, in 2021 agriculture accounted for 63 percent of total land use in Ireland ([World Bank](#)). Ireland is a net exporter of meat and dairy products and a net importer of fruits, vegetables, grains, and oilseeds ([Teagasc](#)). The top exporter of agricultural and related products to Ireland in 2023 was the United Kingdom (UK), accounting for \$5.27 billion of \$15 billion in exports (TDM). The Netherlands was the second largest exporter (\$1.76 billion), followed by Germany (\$1.14 billion). The United States was the sixth largest exporter to Ireland in this category.

### *Ireland's imports from the United States*

Ireland's imports from the United States of intermediate and consumer-oriented agricultural products totaled \$669 million in 2023, an increase of 5 percent from 2022 (\$638 million). Much of this increase is due to an increase in the total value of U.S. imports across several of the top commodities. For U.S. agricultural exports, the strength of the U.S. dollar against the euro, has increased the overall cost of these products in the Irish market. For example, in 2023, soybean meal accounted for \$103 million, a 57 percent increase from 2022. Forestry products accounted for \$87 million, an increase of 46 percent from 2022. Other large value imports from the U.S. included distillers grains (\$100 million), other feeds & fodders (\$95 million), live animals (horses) (\$33 million), distilled spirits (\$42 million), and eggs & related products (\$21 million).

### **Population and key demographic trends**

As of 2023, Ireland has a population of 5,281,600 people with 28.4 percent of the total population residing in Dublin ([CSO](#)). Ireland's labor force comprises 2.518 million people (2021 est.), of whom 5 percent work in agriculture ([CIA World Factbook](#)). The population enjoys high living standards with an aging labor force.

The calendar year of 2022 was the first full year in which European consumers returned to dining-out following the COVID pandemic supporting a rebound in the foodservice sector. The foodservice landscape evolved with the reopening of offices, but use of workplace canteens is expected to remain lower due to the rise of hybrid work schedules. In 2022, Ireland's foodservice sector improved as compared to 2021 but sales remained below pre-pandemic rates. Another trend influencing consumer preferences and socializing is Thursday surpassing Friday as professionals' preferred time to eat-out.

### *Inflation continues to impact purchases*

Consumer prices in Ireland rose by 3.4 percent over the 12 months leading up to February 2024 based on the latest available data ([CSO](#)). This is down from an annual increase of 4.1 percent to January 2024 and the fourth consecutive month where the inflation rate was lower than 5 percent ([CSO](#)). In 2023, restaurants and hotels had the largest increases in consumer price categories, mainly due to higher prices for alcoholic drinks and food consumed in licensed premises, restaurants, cafes etc. Inflation rates for food & non-alcoholic beverages also increased due to higher prices across a range of products, including vegetables, mineral waters, soft drinks, fruit & vegetable juices, bread & cereals, sugar, chocolate & confectionery, and meat. According to [Kantar](#), grocery price inflation in February 2024 declined to 5.3 percent, the lowest rate since March 2022 and a decrease of 1.5 percentage points from January 2024.

Despite falling inflation rates, cost of living remains a top concern among Irish consumers (CoreResearch; Ibec). Recently, Irish consumers have been managing tighter budgets through a ‘little and often’ approach to shopping at retail/grocery stores, trading down their purchases and being more price conscious. Additionally, while Irish food prices have increased, overall food inflation in Ireland over recent years has been lower than other EU countries.

**Size of economy, purchasing power & consumer behavior**

Ireland’s GDP per capita is second among EU Member States, at 133 percent above the EU average (Eurostat). The high GDP per capita in Ireland is partly explained by the presence of large multinational companies with a significant presence in the country. Over 1,600 overseas company operations are based in Ireland, employing over 250,000 people (DETE). Roughly 20 percent of all private sector employment in Ireland is estimated to be directly or indirectly attributable to foreign direct investment. The country attracts businesses and foreign direct investment from sectors such as information and communication technologies, life sciences, financial services, engineering, and business services. Many multinational companies undertake strategic activities such as advanced manufacturing and research and development in Ireland. According to the CIA World Factbook, Ireland has a real GDP (purchasing power parity) of \$515.88 billion (2021 est.).

The latest publicly available information indicates that agriculture composes just 1.2 percent of GDP according to the 2017 estimate. However, roughly 66 percent of Ireland’s land is agricultural with 51 percent as permanent pasture and 15 percent in arable land (CIA World Factbook). Ireland’s key agricultural products are milk, barley, beef, wheat, potatoes, pork, oats, poultry, mushrooms/truffles, and mutton. In 2023, according to Bord Bia’s 2023-2024 Export Performance and Prospects, Ireland’s food and drink export destinations were split relatively evenly between international markets (30 percent), the EU (36 percent) and the UK (34 percent). Irish exports to the United States decreased by roughly 5 percent in 2023 to \$1.7 billion (TDM). This decrease was primarily due to a decline in the volume of Irish whisky exports. Irish whisky exports to the U.S. decreased by 21 percent in 2023, dropping from \$576 million in 2022 to \$457 million in 2023 (TDM).

In contrast, the UK is the largest single destination for Irish food, drink, and horticultural exports. Bord Bia estimated the 2023 Irish share of total agricultural exports destined for the UK at 34 percent, up two percentage points compared to 2022. This is still lower than the levels seen prior to the Brexit referendum (Bord Bia). Total trade between Ireland and UK amounted to \$13.47 billion in 2023, the Irish portion of this increase in total agricultural trade is largely attributed to an increase in Irish exports of meat and livestock, drink, and prepared consumer foods exports to the UK (TDM). Irish businesses cited inflation, energy prices, labor costs, geopolitical tensions, and access to raw materials among their biggest competitive risks (Bord Bia).

**Recent trends**

Irish consumer food trends reveal a growing preference for locally sourced, sustainable, healthy, organic and plant-based products. In Dublin, sales of convenience products such as ready-to-eat and time-saving meals have also increased. Consumers are increasingly interested in the origin of their food, nutritional transparency, and a desire for unique flavors and experiences. Online shopping for groceries is gaining popularity, demonstrating the need for innovative e-commerce strategies in the food industry.

Advantages	Challenges
The United States is a popular tourist destination and American culture is widely spread on social media platforms, making American products familiar to Irish audiences.	Most of the foods supplied in Ireland come from the EU or the UK due to geographic proximity and preferential tariff rates.

Some grocery retailers showcase U.S. food products in a special section to direct consumers to this area and highlight American products.	U.S. exports are subject to tariffs and duties in Ireland which may make them more expensive than products from the EU which do not face any import duties.
Ireland is an English-speaking country, which eases many of the operating challenges for American exporters. And it serves as a gateway into other European markets.	There are trade barriers for certain U.S. products such as meat and poultry where the EU regulations differ from U.S. regulations.
Consumer trends in Ireland, such as sustainability and healthy foods, mirror trends in the U.S.	Many European and UK specialty products are popular in Ireland and are widely available.

## Section II. Exporter Business Tips

The Irish market presents many opportunities for U.S. exporters specializing in consumer-oriented products. For those considering entering this market, it is crucial to undertake comprehensive market research, focusing on the specific sector of interest, whether it be retail, foodservice, or food processing. Ensuring compliance with EU food laws, packaging standards, and labeling requirements is essential for a successful entry. See FAS GAIN reports on the Food and Agricultural Import Regulations and Standards Reports (FAIRS) for the EU, including the [annual country report](#) and [annual certificate report](#). Exporters should also be aware that Ireland has specific labelling requirements for alcohol (see: [Announcement of Alcohol labelling regulations](#) and [Public Health \(Alcohol\) \(Labelling\) Regulations 2023](#)). For certain food products, obtaining animal product health certificates is a necessary step in the export process. Exporters should also examine whether their products are subject to import duties and excise tax. This may be searched through the European Commission’s [Access2Markets website](#) using ‘My Trade Assistant’ search engine. Exporters of certain animal products must also comply with EU animal welfare standards.

Strategic marketing efforts can be very important to the success of a product in the European market. Furthermore, highlighting product selling points, such as sustainability, organic attributes, or plant-based features, can significantly enhance market appeal. Participating in relevant food, beverage, and industry trade shows provides a valuable platform for networking and showcasing new-to-market products. Large European food and beverage trade shows include Anuga or SIAL Paris. More information on these trade shows can be found [here](#). As a relatively small market, Ireland has few local trade-oriented shows for the agri-food industry. Overall, a well-informed and strategic approach is essential for U.S. exporters to be successful in Ireland’s dynamic market.

### Consumer Tastes and Trends

Many trends are driven by the influence of social media upon consumer tastes, concerns, and behavior. Traditional media, as well as government regulations, also influence the perception of certain foods and their availability in the Irish market.

Ultra-Processed Foods: Irish consumers are increasingly concerned about ultra-processed foods, driven by concerns relating to health implications associated with such products. Consumer surveys indicate an interest in nutrient-dense, minimally processed options. Many consumers are also scrutinizing labels to choose foods with ingredients they recognize and perceive as wholesome. Home-baking and traditional Irish meat and potato meals remain very popular.

Local Products: Locally sourced and sustainable products are growing in popularity among consumers. Consumers have also increased demand for healthy and organic options. The Irish Government is increasing financial support for Ireland’s domestic organic sector to encourage greater organic production.

**Sustainability:** Sustainability is an important and multifaceted trend in the Irish market, encompassing various aspects of the agri-food industry such as concerns over excess packaging, support for a circular economy, decarbonization of production processes, and the reduction of food waste. Indeed, a [2019 PwC Ireland study](#) found that 41 percent of Irish consumers are prepared to pay a premium for sustainable products. Moreover, the Irish government seeks to make the country a world leader in sustainable food systems through its ‘[Food Vision 2030](#)’. The sustainability trend has also supported the growth in the use of eco-friendly packaging, businesses adopting circular economy principles, reduction in producers’ carbon footprint, and combating food waste.

**Responsible Marketing:** Consumers are attentive to responsible marketing practices, seeking transparency and authenticity in how food products are presented and promoted. This shift is motivated by a desire for truthful and ethical communication, prompting consumers to support brands that prioritize responsible marketing, including clear labeling, honest representation of product attributes, and ethical advertising practices. Consumers are conscious of the origins of their food and transparency regarding nutritional information. This trend is fueled by an interest in supporting local businesses and concerns about food safety. Ethics and transparency in the agricultural and food supply chain is emphasized by the Irish government through the creation of an [Agri-Food Regulator](#).

**Health & Plant-Based Diets:** Irish consumer trends toward plant-based products, appear to be driven by health considerations, environmental concerns related to products of animal origin, and an increasing number of individuals adopting vegetarian, vegan, or flexitarian lifestyles.

**Convenience:** Convenience is increasing in importance to consumer food choices in Dublin. Ready-to-eat and time-saving meal solutions are gaining importance as consumers face busier lifestyles and time constraints. Ireland has a wide availability of healthy ready-to-eat meals, such as salad bars and microwavable or oven-ready frozen meals both in convenience retailers (Centra and Spar) and in supermarkets.

**Epicurious:** Irish consumers seek novel culinary experiences with unique and diverse flavors, reflecting a changing food culture in Dublin where individuals are more adventurous in their taste preferences, influenced by global culinary trends.

**‘Free From’:** Products which are free from allergens also are on trend with increasingly wide options and availability of foods without traces of many common allergens, such as nuts or gluten, and a growing market for these products.

### **Section III. Import Food Standards & Regulations and Import Procedures**

In Ireland, import control checks are carried out on imported products to ensure they meet EU requirements. These import controls include documentary checks, identity checks, and physical checks.

Some foods are considered to pose a higher risk to public health, animal health, or the environment in terms of diseases, pests, or contaminants. To control these risks, additional requirements exist for these products, including additional documentation and prior notification before arrival of the food into Ireland. These foods must enter Ireland through a specific entry points called a Border Control Post (BCP).

Please see the latest [EU Attache Reports \(GAIN\)](#) for additional detailed information on exporting to an EU member state, including for products of animal origin and products considered high risk which are not of animal origin. The following reports are updated annually and should be especially useful:

- [EU Food and Agricultural Import Regulations and Standards Country Report](#)
- [EU Food and Agricultural Import Regulations and Standards Export Certificate Report](#)

### General Food Law Requirements

The [Food Safety Authority of Ireland](#) (FSAI) is statutory, independent and science-based body, principally concerned with food safety and hygiene.

When importing foods into the EU, you must comply with the general principles of food law set out in [Regulation 178/2002/EC](#). This legislation defines what is meant by unsafe food and food safety requirements. Food imported into the EU must comply with the relevant food law, or where an agreement exists between the EU and the exporting country, with the agreed requirements which are recognized by the EU as equivalent. Imports must also comply with the food hygiene requirements of [Regulation \(EC\) No 852/2004](#). Get more details on [general hygiene requirements](#).

Additionally, there is specific legislation for imports of the following foods:

- [food of animal origin](#)
- [food of non-animal origin](#)
- [composite products](#)
- [certain food contact materials](#)

U.S. beef, poultry, and dairy products face barriers to entry into the EU.

Pay close attention to EU regulations on maximum residue levels (MRLs), the relevant legislation is available below:

- [veterinary medicine MRLs](#)
- [contaminant MRLS](#)
- [pesticide MRLs](#)

The EU will reject consignments containing food that do not comply with EU MRLs. The EU prohibits the use of pathogen reduction treatments and the imported poultry treated with these antimicrobial substances. Beef and poultry must be slaughtered and processed at an establishment approved by the EU, please refer to the [Non-EU country establishments database](#) for more information and the [establishment lists](#).

For certain food products the individual responsible for importing the consignment must register with [TRACES NT](#) (Trade Control and Expert System).

### Customs

All goods imported into Ireland must be declared to the Revenue Commissioners ([Revenue](#)) on arrival. Goods imported from outside the EU, require an electronically completed custom's declaration using Revenue's [Automated Entry Processing \(AEP\) system](#). To trade with countries outside the EU, a business must have a unique [EORI number](#) (Economic Operators Registration and Identification number).

### Labelling Requirements

[Regulation \(EU\) No. 1169/2011 \(FIC\)](#) sets out the general principles and obligations regarding the provision of food information. In Ireland, food information must be provided in English. Other languages, including Irish, may be provided in addition. [Alcohol labelling law](#) specific to Ireland will apply from May 22, 2026. More detailed labelling requirements are available at the following link on the FSAI website: [Labelling – General Labelling](#).

## Tariffs and FTAs

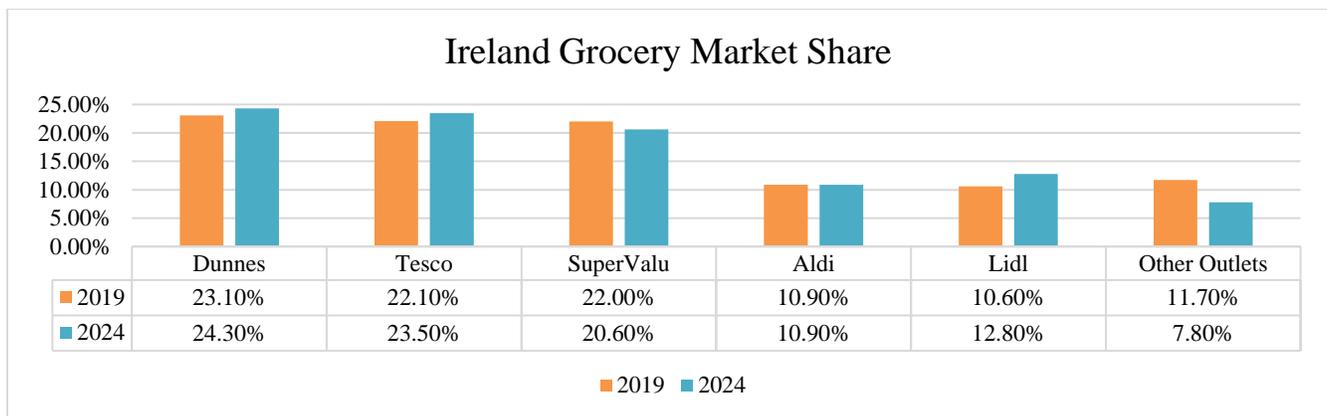
Ireland participates in the free trade arrangements of the EU and EFTA. Ireland is a member of the World Trade Organization (WTO) and trade between the U.S. and EU is governed by these rules. For a list of trade agreements with the EU and its Member States, as well as concise explanations, please see [Trade and Related Agreements Database](#).

To find the tariffs which apply to your product, please search the [EU Customs Tariff \(TARIC\)](#) database by HS code. Additionally, the EU's [Access2Markets](#) portal provides information on EU tariffs and other measures applied to all products imported into the EU, including EU tariffs, rules of origin, taxes and additional duties, import procedures and formalities, and product requirements.

Information about Ireland's excise duty rates on alcohol products and sugar sweetened drinks are available on [Revenue Excise Duty rates webpage](#).

## Section IV. Market Sector Structure and Trends

According to Ireland's [Competition and Consumer Protection Commission](#), concentration in the grocery retail sector has reduced and competition on price, quality, location and service has improved in recent years. [Kantar](#) research add the additional dimension that the main grocery retailers are losing market share to discount supermarkets (such as Aldi and Lidl) and other grocery outlets.



Source: [Kantar](#) (retrieved 3/27/2024)

The food service industry continues to recover post-pandemic. Irish consumers are returning to eating out, especially in large urban cities such as Dublin. However, the cost-of-living crisis continues to weigh on the sectors recovery. According to [IbisWorld](#), a market research provider, while the market size of restaurants and takeaway shrank by 1.3 percent (over the last five years), between 2023 and 2024 the number of restaurants grew by 1.2 percent indicating a marginal recovery.

## Market Trends and Issues to Watch

Sustainability is a driving market trend and a regulatory issue in Ireland encompassing packaging, food waste reduction, decarbonization, circular economy practices, and the overall management of food waste. This reflects an emphasis by consumers and the government on environmentally focused initiatives. Furthermore, producers are implementing product reformulations, nutritional labeling, and responsible marketing practices in response to the heightened importance of healthier food choices for consumers and retailers.

Additional programs to consider include government initiatives to address unfair trading practices ([Unfair Trading Practices \(UTP\) Directive](#)), advancement of Ireland’s food processing industry, investment in domestic food manufacturing, and regulatory limits on food ingredients (including additives, flavorings, etc.) and food contact materials.

**Products in market with strong sales potential**

- distillers grains, feeds & fodders
- soybean meal
- corn
- eggs & products
- live animals (racehorses)
- vegetable oils
- sugars & sweeteners
- soup & food preparations
- dairy products
- wine & related products
- distilled spirits

**Products not in market due to significant barriers**

- Food additives not approved by the European Commission
- Red meat and meat products with hormones
- Poultry (non-tariff barriers)
- Biotech-derived products that are not approved in the EU

**Section V. Agricultural and Food Imports**

Ireland’s agricultural and related product imports from the United States totaled \$810 million in 2022, nearly a 27 percent increase from 2021 (\$638 million). In 2023, Ireland’s imports of U.S. agricultural and related products grew by 1.6 percent, according to the latest available trade data from January to November 2023 (TDM).

Ireland also offers a good market for U.S. processed food products including confectionery products, condiments, distilled spirits, sauces, snacks, wine, and healthy snacks meeting EU regulatory requirements.

**Top U.S. Exports to Ireland 2019-2023, in millions of U.S. dollars**

HS Code	Commodity	2019	2020	2021	2022	2023
230990	Animal feed preparations (mixed feeds, etc.)	\$71.4m	\$54.8m	\$96.5m	\$98.9m	\$71.1m
441600	Wood casks, barrels, vats, tubs, and other coopers' products	\$32.2m	\$33.5m	\$20.9m	\$39.3m	\$62.9m
220860	Vodka	\$0.7m	\$0.1m	\$0.1m	\$6.1m	\$32.9m
010121	Horses, live, purebred	\$25.6m	\$36.4m	\$23.8m	\$18.3m	\$28.5m
210690	Food preparations	\$11.8m	\$9.8m	\$26.3m	\$16.7m	\$22.2m
230320	Beet-pulp, bagasse and other waste of sugar manufacture	\$4m	\$6.4m	\$10.8m	\$16.3m	\$20.6m
130219	Vegetable saps and extracts	\$25.8m	\$23.7m	\$24.4m	\$23.3m	\$19.8m
040891	Birds' eggs, not in shell, dried, whether or not sweetened	\$0m	\$0m	\$1.4m	\$14.4m	\$19m
350220	Milk albumin	\$3.9m	\$3.1m	\$4.5m	\$4.2m	\$17.2m
220421	Wine	\$5.5m	\$5.2m	\$15.3m	\$14.6m	\$13.3m

Source: TDM. For more detailed U.S. trade statistics please see [Global Agricultural Trade System \(GATS\)](#).

## Section VI. Key Contacts and Further Information

### U.S. Government:

[Foreign Agricultural Service, U.S. Embassy, London \(covering the UK and Ireland\)](#)  
Physical Address: 33 Nine Elms Ln, Nine Elms, London SW11 7US, United Kingdom      Email: [londonag@state.gov](mailto:londonag@state.gov)

### Irish Government:

[Irish Government Department of Agriculture, Food and the Marine](#)  
Agriculture House, Kildare St., D02 WK12, Dublin, Ireland

[Food Safety Authority of Ireland \(FSAI\)](#)  
The Exchange, George's Dock, IFSC, D01 P2V6, Dublin, Ireland

[Board Bia](#)  
140 Pembroke Rd, D04 NV34, Dublin, Ireland

### Irish Trade Associations

[Irish Grain and Feed Association](#)  
8-2 Main St, Rathmoyle, Co. Laois, Ireland

[Food Drink Ireland \(FDI\) – IBEC](#)  
84-86 Baggot Street Lower, Dublin, Ireland  
Contact: Paul Kelly, Director of Food Drink Ireland  
Email: [paul.kelly@ibec.ie](mailto:paul.kelly@ibec.ie)

[Restaurants Association of Ireland](#)  
11 Bridge Court, Citygate, St. Augustine Street, Dublin 8  
Tel: +353 1 677 9901  
Email: [info@rai.ie](mailto:info@rai.ie)

### Attachments:

No Attachments.