

Strategic Review of Ornua

(with a focus on the consumer brand **Kerrygold**)



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Ornua
THE HOME OF IRISH DAIRY

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Executive Summary

The aim of this report is to conduct a thorough strategic review of the company Ornuá, an Irish dairy co-operative organisation, with specific focus on the leading consumer brand Kerrygold. The current strategy of the brand was critically examined, to assess current performance in a dynamic market environment, while identifying key areas of value in which to recommend strategic manoeuvres. The presented recommendations act to alleviate identified performance gaps, driving Kerrygold towards an enhanced market position, fuelled by improved competitiveness through cost saving, brand image enhancement and production optimisation.

The orientation stage explores the organisation's value-capturing process, in which Kerrygold provide high-quality dairy products worldwide while demonstrating a dedication to ethical, sustainable and innovative business practices. Through preliminary literature review as well as extensive interviews with the former CEO and current CFO, the key areas of market dynamics, research and development (R&D), and sustainability were identified as opportunities for growth. The subsequent diagnostics stage further analyses these areas by evaluating Kerrygold's internal operations, industry dynamics and macro-environment through various academic frameworks. The brand faces a strategic trade-off of balancing market expansion and maintaining premium product quality, with increasing rising costs, logistical inefficiencies and increasing sustainability concerns, whilst upholding its competitive positioning. The intervention stage assesses Kerrygold's current strategic approach, described as a broad differentiation perspective focussed on sustainable grass-fed dairy, Irish heritage and premium brand quality. Theoretical frameworks are then implemented to highlight the strategic fit across the company, analysing the alignment of the competitive strategy with the organisational structure and culture, utilising the primary and secondary research collected throughout the process.

To conclude, the evaluation stage outlines three comprehensive recommendations for Kerrygold, targeted towards the areas of strategic challenge recognised, conceptualised into a consulting framework and supported by a definitive roadmap with a timeline for execution. The recommendations include gradual price increases with transparent communication to offset rising costs, developing regional logistic hubs to facilitate effective market expansion, and implementing AI-driven predictive maintenance throughout production facilities to reduce energy consumption.

1. Orientation Stage

1.1 Preliminary Client Case Introduction

Ornua is an Irish dairy cooperative organisation, dominating the agri-business sector as the leading exporter of Irish dairy products. Ornua currently markets its products in over 110 countries around the world (Ornua, 2024b), coordinating operations from its headquarters in Dublin. Founded in 1961, Ornua is owned by Irish dairy processors and farmers, allowing its success to directly benefit Ireland's agricultural sector (Ornua, 2020). The organisation's main goal is to produce and distribute premium dairy products, with brands including Kerrygold, Pilgrims Choice, Forto, Beo Milk, and Dubliner (Ornua, 2023a). These brands cater to a variety of consumer preferences, satisfying wealthier markets by providing premium quality cheese and butter while providing reasonably priced nutritious milk powders in economies of dairy shortage.

This report will exclusively focus on Kerrygold's operations, considering it is the largest and most profitable brand in the Ornua group. Kerrygold is widely renowned for producing high-quality butter and cheese products from Irish grass-fed cows. As Ireland's first billion-euro food brand, Kerrygold has established a significant global presence, leading the premium butter market in the US, Germany, and the UK. Kerrygold's outstanding reputation is based on its strong Irish dairy heritage, effective sustainability initiatives, and superior quality (Ornua, 2019a). Kerrygold's extensive dedication to excellence results in innovative dairy products, ongoing sustainability efforts, and maintaining strong relationships with Irish dairy farmers (Ornua, 2024a). Kerrygold solidifies its position as the leading dairy brand in the global agri-food sector through continued expansion into emerging markets, including the Middle East and Asia.

#1

butter brand in Germany

#2

butter brand in the USA

#3

block butter brand in the UK

1.2 Organisational Purpose Discussion: Value Capture

Ornua's primary goal with Kerrygold is to create value for its Irish farmers by providing high-quality dairy products worldwide and demonstrating a dedication to ethical, sustainable, and innovative business operations. Value is captured by the organisation when its strategies align with its mission and fundamental principles, which include "With Heart, Thought, Vision and Drive".

Ornua prioritises humility and collaboration, partnering closely with its dairy farmers to build long-lasting, trusting relationships and valuing diversity within its workforce to create a cohesive team that is enthusiastic about bringing high-quality products to the market (Ornua, 2021). It upholds the highest standards of production through a two-way flow of communication with customers, ensuring the continued satisfaction of consumer requirements. The company guarantees commitment to sustainability and product quality through meticulous planning efforts and an ongoing commitment to high performance (Ornua, 2021). Ornua predicts market trends and adjusts to meet the increasing demand for high-quality, sustainable dairy by investing in innovative practices and procedures, striving to achieve this by focusing on lowering carbon emissions and encouraging environmentally conscious farming techniques (O'Brien, 2018). Ornua's dedication to strategic thinking and innovation reflects its aim for Kerrygold to embrace change and remain adaptable, with the company continuing to develop as the global dairy industry changes, developing new products and entering new areas like the Middle East and Asia (Ornua, 2024a). By taking this proactive stance, Kerrygold maintains its competitiveness as the Irish dairy industry continues to grow.

Ornua's attitude towards accountability and ownership demonstrates its drive to provide value for its clients and associated farms, reacting quickly when difficulties emerge. This determination to identify solutions and accomplish goals promotes accountability, leading to continuous positive results over time (Ornua, 2021). The company's fundamental values, which promote value creation via innovation, sustainable practices, and an unwavering dedication to quality, are the foundation of the organisation's purpose. This strong foundation positions its brand, Kerrygold, as a leader in the global dairy market, delivering value to both its member farmers and customers.

1.3 Identification of Key Strategic Issues

We began an in-depth analysis of Kerrygold to identify and understand the primary strategic challenges that they face, laying the groundwork for our strategic review. This process began by identifying issues through the Ornua Annual Report 2023 (Ornua, 2023b) and interviewing the former CEO and current CFO to gain insights into the operation of the company.

Market Dynamics

Ornua faces rising inflation, supply chain disruptions, and geopolitical risks. Brexit has increased the costs of exports to the UK market through customs delays, while potential U.S. tariffs pose a threat to Kerrygold's key market (Intvw 1 & 2, 2025). Inflation has also driven up production expenses, impacting profitability (IFAC, 2024). To mitigate these risks, Ornua wants to expand Kerrygold into the Middle East and Asia, reducing its reliance on Western markets. Consumer demand for sustainability is also pressuring Kerrygold to maintain and improve its sustainability aspects. With increasing competition from plant-based alternatives, Ornua must strengthen its supply chain, enhance sustainability efforts, and improve market adaptability to sustain its competitive edge.

Research and Development (R&D)

In 2023, Ornua launched 26 new Kerrygold products and expanded Kerrygold Park, the Kerrygold production facility, requiring an investment of €40 million (Ornua, 2023b). These investments further strengthen Kerrygold's ambition of becoming a global brand. A major commitment for Ornua's R&D team is the goal of having fully circular packaging by 2030 across all brand products. This commitment will require a large capital investment to ensure that the packaging can meet these standards (Ornua, 2023b). The R&D department emphasises company initiatives to improve brand image as well as product innovation, pioneering the implementation of sustainability initiatives to sustain their brand commitments. To ensure that R&D efforts represent a valuable investment, it will be essential to maintain progress towards becoming a globally recognised brand, particularly through expansions into the Middle East and Asia, which will create additional revenue streams (Intvw 1 & 2, 2025).

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Sustainability

Ornua preaches an ongoing commitment to positively addressing environmental issues, improving its CDP rating in 2023 from a C to a B rating for climate-related emissions (Ornua, 2023b). However, dairy farming produces a high intensity of gaseous emissions, such as GHG and NH₃ (Teagasc, 2024), damaging the ozone layer and, therefore, exacerbating climate change, resulting in a fully circular effect of aggravating operational conditions for farmers. Furthermore, when weather conditions are against the farmers, the yield of milk from cattle is lower, causing an increase in emissions per litre. Therefore, positioning itself at the forefront of sustainability and stringently following EU policies is crucial for Ornua.

1.4 Preliminary Literature Review

A strategic analysis of Ornua examined its competitive positioning, leveraging academic literature, industry reports (Teagasc, ECB, EU), and competitor insights (Dairy Gold, Flora). Kerrygold's strategy was assessed through financial reports, executive interviews, and market research. Recommendations focused on innovation, sustainability (Climate Action Plan), and global expansion (FDA, emerging markets). *For an in-depth preliminary literature review, please see Appendix 1a.*

1.5 Terms of Reference Discussion

As stated in our Terms of Reference (ToR) document, Kerrygold was selected as our client study due to its extensive portfolio as a leading brand within the agricultural industry, as well as its prominence in the Irish market, fuelling the economy through generating domestic revenue and employment opportunities. The document outlined our plan to leverage key internal insights through intense interviews with the former CEO and current CFO of the company, in tandem with extensive literature review, to identify areas of strategic challenge for our client and achieve our goal of designing comprehensive recommendations to enhance market competitiveness. Following our detailed plan of engagement with our client and relevant literature allowed our team to utilise internal and external perspectives to create value for our client, contributing to their strategic operations.

Setting out a detailed ToR document upon the initial formulation of our consulting team was crucial in determining the guaranteed success of our initiative. This document acted as an anchor throughout the entirety of the project, a reference point for team members to refer to, preventing any deviating measures and ensuring constant alignment of decision-making with our goals. Following the established Gantt chart and work breakdown structure (*see Appendix 1b*), simultaneously with regular check-ins, allowed our team to successfully complete distributed tasks within the allocated structured timeline, preventing scope creep and ensuring project deadlines were met. This planning strategy gave our team confidence in our capacity to oversee the project successfully and in our ability to offer our client a strategic report outlining our progression plan to enhance market power and achieve growth in the agri-business market.

1.6 Key Interview Findings: Former CEO and Current CFO

- *Key strategic issues:* Sales growth, international expansion into new markets, international tariffs affecting key profitability markets, and improving sustainability of production
- *Brexit challenges:* Increases in administration, bureaucracy, freight, and distribution costs
- *Brand Differentiators:* Strength of brand, grass-fed Irish dairy, rich Irish heritage, packaging
- *Key Future Markets:* Middle East and Asia due to dairy supply shortage, implemented through third-party distributors, adapting product offering to match cultural and financial preferences
- *Competitor Differentiators:* Innovation, new product development, brand strength
- *Price Sensitivity:* Not sensitive in general, slightly more in the UK and Ireland compared to the US, Kerrygold consumers are wealthier consumers
- *AI Use:* Automated invoicing to free up employee time
- Ensure alignment of current strategy with a matrix organisational structure through regular stakeholder meetings
- Adapts to consumer demands through two-way communication with customers
- Creates a positive employee environment through regular staff engagement surveys (7.6/10), additional employee benefits (maternity leave) and an enjoyable atmosphere

See Appendix 1c. for a full interview Q&A

2. Diagnostics Stage

2.1 Macro-Environmental Analysis: PESTLE

Kerrygold operates in the Irish agri-business industry, an export-oriented market worth approximately €18.28 billion in 2024 (IFAC, 2024). To examine the macroeconomic environment, we identify external factors impacting the operations of the firm using a PESTLE analysis (Team FME, 2013).

Political - Trade Policy

Kerrygold relies heavily on its ability to trade internationally, benefitting immensely from European Union (EU) participation, specifically EU free trade policies and efforts to remove trade barriers between member states to intensify the flow of goods between countries (European Union, no date). However, global political tension has the power to significantly impact Kerrygold's international sales and pricing, potentially reducing the company's global competitiveness. In the past, Kerrygold has suffered firsthand from political unrest, resulting from US tariffs of up to 25% imposed by President Trump on Irish dairy exports during 2019 stemming from aircraft subsidy disputes with the EU (Daly & Lawless, 2021), increasing the price of Kerrygold products in the US and severely impacting their ability to compete with domestically produced goods. The re-inauguration of President Trump creates potential hurdles for Kerrygold, as the threat of imposing a blanket tariff of 10% on all imports into the country (Haddad, M., 2024) as an attack manoeuvre during geopolitical tension with China, returns the company to a similar disadvantaged position of 2019. As the second most popular labelled refrigerated brand of butter in the US market with approximately €156 million in sales (Statista, 2024), navigating trade policy with the US is essential for Kerrygold operations.

Economic - Inflation & Global Supply Chain Disruption

With approximately 81% of businesses in the food and agriculture sector reporting an increase in total costs last year (IFAC, 2024), rising inflation costs in key markets and global supply chain disruption resulting from Brexit immensely contribute to Kerrygold's costs. Another consecutively positive yearly inflation rate in Ireland of 1% in 2024 (Eurostat, 2025), further exacerbates rising costs of production, packaging and ingredients for Kerrygold. Positive inflation rates in the company's major markets, including the US, EU and United Kingdom (UK), erode consumer purchasing power and reduce demand for the premium products offered by Kerrygold.

Although the EU-UK Trade and Cooperation agreement outlines a tariff and quota-free trade agreement (European Commission, 2020), Kerrygold experiences non-tariff barriers trading with the UK. Such barriers can include customs checks and administrative and documentation requirements, leading to shipping delays of imported materials and exported products across the Irish Sea, resulting in increased freight and distribution costs, which negatively impact Kerrygold's ability to sufficiently satisfy and compete in UK markets. The general weakening of the British Pound Sterling post-Brexit (European Central Bank, 2025) signifies the economic uncertainty of the UK's trading future with the EU, creating a less favourable trading environment for Kerrygold as their products become more expensive in UK markets.

Technological – Innovation

The realisation of the importance of technological innovation in the agricultural landscape has become widespread, with the necessary combination of technology and agricultural entrepreneurship at the forefront of agri-business growth and development (Singh, 2014). Kerrygold appreciates the value of innovation, investing €40 million in the development of Kerrygold Park, their flagship butter production facility, equipped with cutting-edge processing technology and infrastructure, producing over one million packs of butter a day to serve 60 markets globally (Ornua, 2023c). Constant investment in research and development allows Kerrygold to drive market expansion, launching 26 new Kerrygold products and product extensions in 2023, along with a major global marketing campaign which reached up to 150 million consumers in its first 12 months (Ornua, 2023c).

Environmental - Product Packaging & Pasture-Based Farming:

The Food Vision 2030 Strategy for the Irish agri-food sector, introduced by the Irish government, sets out a ten-year strategy to transform Ireland into a world leader in Sustainable Food Systems. This strategy ensures the production of safe, nutritious and high-value food while protecting and enhancing the country's natural resources to provide the basis for the sector's future competitive advantage (Government of Ireland, 2022). Many similar standards and strategies exist in the agri-business environment, which Kerrygold are required to follow to protect its brand reputation and maintain its market power. Failure to cooperate with stringent standards is costly to the company, in the form of reduced consumer demand and a subsequent loss in revenue.

In the aim of reducing waste in line with government strategy, Kerrygold has committed to achieving fully circular recyclable on-shelf packaging that is responsibly sourced by 2030 (Ornua, 2023c). Kerrygold is also committed to providing high-quality products using pasture-based systems to fuel their cows with Irish grass and minimal supplementary feed (Kerrygold, no date), producing lower carbon emissions, preventing soil erosion and promoting biodiversity as a result.

See Appendix 2a. for a full PESTLE analysis

2.2 Industry Analysis: Porter's Five Forces

To truly gain a deep understanding of the Irish agri-business industry, we analyse the market in which Kerrygold competes through the application of 'Porter's Five Forces' framework, offering a complete picture of the factors influencing profitability in the industry (Porter, 2008). Kerrygold faces a relatively low to moderate bargaining power of suppliers, as the brand utilises a supplier network of 14,000 dairy farming families across Ireland (Ornua 2023b), limiting their individual negotiating power. However, the distinctive pasture-based farming system the brand relies on requires substantial investment, increasing suppliers' bargaining power through their unique, high-quality provision of input. Positioning itself as a premium brand, Kerrygold combats a moderate threat of substitutes level, as competitors can undercut with a price-quality trade-off or offer plant-based alternatives.

The potential of new market entrants in the dairy industry is low, as the first Irish food brand to exceed €1 billion annual retail value (Ornua, 2019b), competing with an organisation as large as Kerrygold is practically impossible, as duplicating its expansive network and brand strength will require substantial capital investment. However, with a handful of integrated store groups controlling most of the market and creating a concentrated buyer side (Dobson *et al.*, 2001), with said retailers stocking a variety of leading premium dairy products, such as Dairygold who experienced a €1.4 billion turnover in revenue during 2023 (Dairygold, 2024), Kerrygold faces a moderate level of the bargaining power of buyers and rivalry of competitors. Therefore, Kerrygold must adhere to sustainable initiatives, maintain valuable buyer and supplier relationships, continuously market its Irish grass-fed methods, and continue to deliver on its promise of ethical, high-quality production to preserve its powerful brand image and protect its market share.

See Appendix 2b. for an in-depth analysis of Porter's Five Forces

2.3 Internal Analysis

2.3.1 VRIO

To effectively assess Kerrygold's potential for sustained competitive advantage, it's crucial to examine the internal factors that shape their capabilities. By identifying both strengths and weaknesses, we can adopt a proactive strategic approach. The VRIO framework will be employed to highlight key strengths and evaluate the factors that determine whether these strengths can lead to a lasting competitive edge (Cardeal and Antonio, 2012). Our findings are shown in Figure 2a.

VRIO Analysis					
Resource / Capability	Valuable	Rare	Imitable	Organised	Competitive Consequence
High-Quality Grass-Fed Dairy Products	Yes	Yes	No	Yes	Sustained Competitive Advantage / Differentiation
Brand Reputation & Trust	Yes	Yes	Yes	Yes	Sustained Competitive Advantage
Global Market Presence	Yes	Yes	No	Yes	Sustained Competitive Advantage
Marketing & Innovation	Yes	No	No	Yes	Innovation & Growth

Figure 2a

Kerrygold's strategic challenges, sustainability, market dynamics, and R&D align with the VRIO framework and highlight important areas for maintaining its competitive advantage. Its grass-fed dairy system and premium product quality are both valuable and rare, addressing growing consumer demand for natural and sustainable products (McKinsey, 2023). However, climate-related risks and emissions emphasise the need to enhance the organisation of these resources to meet sustainability goals. Its brand reputation and strong ties with Irish farms provide barriers to imitation, yet expanding into markets like the Middle East and Asia requires not only culturally tailored marketing but also an adaptive organisational structure to navigate varying regulations, supply chain requirements, and consumer preferences. Balancing the capital allocation for these expansions and innovations while maintaining its responsible supply chain is imperative to sustaining differentiation (Peteraf, 1993). Addressing these challenges will enable Kerrygold to fully leverage its VRIO-based strengths and maintain leadership in the premium dairy market.

Please see Appendix 2c. for full VRIO analysis

2.3.2 Value Chain

In his seminal work, “*Competitive Advantage (1985)*”, Michael Porter conceptualised the value chain framework as a tool for systematically analysing how organisations create value for their customers. By dissecting the interconnected activities within a business, this framework can enable firms to identify important sources of competitive advantage and enhance operational efficiency (Porter, 1985). It provides an effective lens for assessing where a company excels and where improvements can be made (Zamora, 2016). Our findings are displayed in figure 2b.

Kerrygold's value creation stems from its robust logistics network, ensuring product freshness. Logistics play a crucial role in delivering consistent product quality across Kerrygold's 110+ international markets (Ornua, 2023b). However, distribution inefficiencies in Asia and the Middle East suggest a need for regional logistics hubs to reduce transportation costs and improve strategy for penetrating these markets. These are key growth markets Kerrygold are targeting due to a shortage of dairy supply (Intvw 1 & 2, 2025). A well-integrated logistics hub provides flexibility in responding to disruptions, ensuring consistent product availability (Lu, 2018).

Beyond logistics, sustainability is an increasingly critical component of Kerrygold's value chain strategy (Intvw 1 & 2, 2025). It has already established strong environmental credentials through its grass-fed dairy model, which supports regenerative agriculture and lower carbon emissions compared to grain-fed alternatives (Provenza, Kronberg and Gregorini, 2019). However, with growing regulatory pressures and consumer demand for eco-conscious products, further advancements are required to strengthen Kerrygold's sustainability leadership.

As the value chain landscape evolves, Kerrygold must consistently adapt its strategic approach to maintain its competitive edge in the industry (Ensign, 2001). Its technological research and development has contributed significantly to its operational efficiency and product quality, particularly through dairy processing and quality control systems with its new state-of-the-art production facility, Kerrygold Park. Kerrygold has successfully implemented modernised production techniques that ensure consistency, efficiency, and food safety, reinforcing its premium positioning (Intvw 1 & 2, 2025). However, opportunities for improvement remain with AI-driven initiatives.

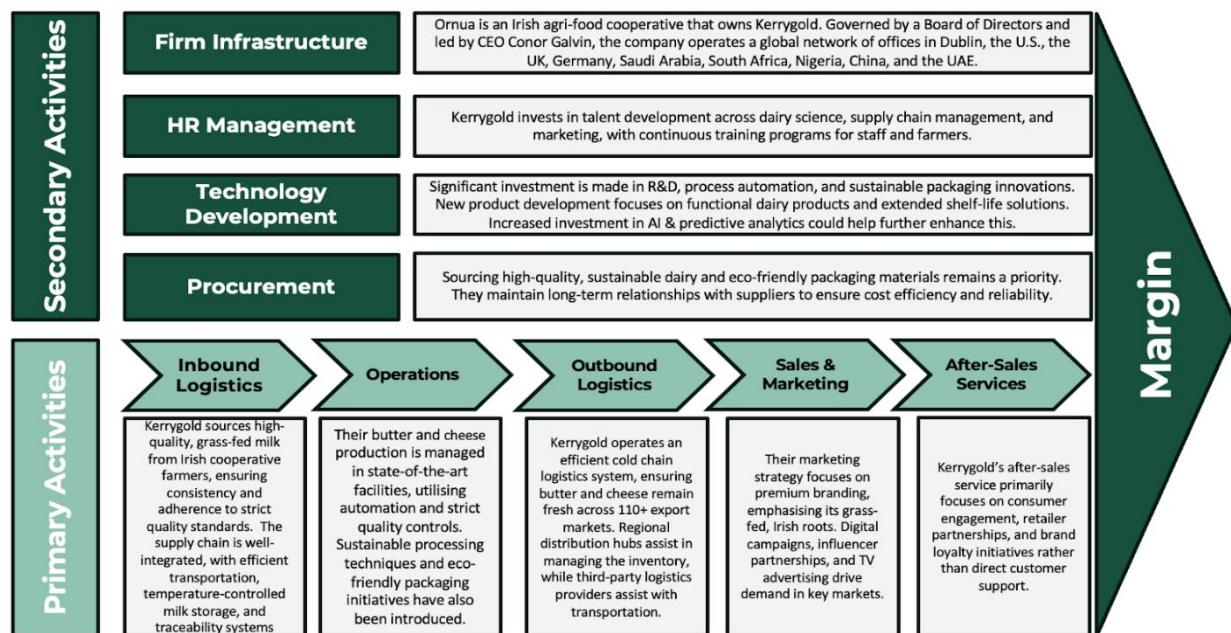


Figure 2b

The value chain framework not only identifies key value-adding activities but also highlights the interdependencies between primary and support functions. Kerrygold's logistics operations (primary) are closely linked to sustainability efforts and technological advancements (support), ensuring efficient global distribution, environmental responsibility, and premium product quality. Its investment in modern production facilities further enhances operational efficiency, illustrating how support activities strengthen primary processes.

2.4 Relevance of Literature Reviewed

The literature review provided strategic insights into Orna's position within Ireland's dairy sector. Sources included industry reports (Teagasc, ECB, EU), competitor analyses (Dairy Gold, Flora), innovation and sustainability reports (Climate Action Plan), and market outlooks (FDA, emerging markets). These informed strategic recommendations for operational sustainability and global expansion.

See Appendix 2d. for further analysis of the literature reviewed

2.5 Diagnosis of Strategic Challenges & Choices Made: Trade-offs

Kerrygold faces three key strategic challenges: market dynamics, R&D, and sustainability, each requiring trade-offs that impact its competitive positioning. It must balance growth opportunities and market expansion with logistical inefficiencies and regulatory barriers, which could increase costs and complexity. Rising inflation and supply chain disruptions further pressure cost structures, forcing a trade-off between maintaining premium product quality and price competitiveness. Sustainability is another critical factor where Kerrygold's commitment to a grass-fed dairy model strengthens brand differentiation, but it limits supply flexibility and poses a challenge when expanding into new markets. Additionally, Kerrygold's commitment to fully recyclable packaging by 2030 presents cost and implementation challenges as global regulations on environmental standards evolve. These strategic trade-offs show the complexity of Kerrygold's expansion, innovation, and sustainability commitments in a competitive and rapidly changing industry.

3. Intervention Stage

3.1 Identify Choices Made to Support Current Strategy

Applying Porter's Generic Strategy (Porter, 1980) to evaluate Kerrygold's current strategy shows that they follow a broad differentiation approach. Companies adopting a differentiation approach seek to distinguish themselves within the industry by offering unique features, such as a strong brand image (Tanwar, 2013). This distinctiveness often allows Kerrygold to command a premium price for their products, fostering brand loyalty and the perception that they are more valuable than cheaper alternatives (Intvw 1 & 2, 2025).



Figure 3a

Kerrygold operates on a broad scale and offers distinctive dairy products characterised by grass-fed, sustainable Irish farming methods and a premium brand image. Through loyalty-driven marketing, continuous product innovation, and higher pricing (Intvw 1 & 2, 2025), Kerrygold has established a position where quality and uniqueness, rather than cost, form the basis of its competitive advantage. This approach enhances brand loyalty, facilitates premium pricing, and creates considerable barriers for potential new entrants to the market (Porter, 1980).

3.2 Discuss Strategic Fit Across Organisation: Activity Map

An Activity Systems Map (Porter, 1996) was used to assess how Kerrygold's operations align with its differentiation strategy (Porter, 1980). Each node (premium products, brand heritage, innovation and global presence) represents a cornerstone of Kerrygold's strategy of interlinking activities. This has taken a long time to master and makes it difficult for any competitor to replicate (Intvw 1 & 2, 2025).

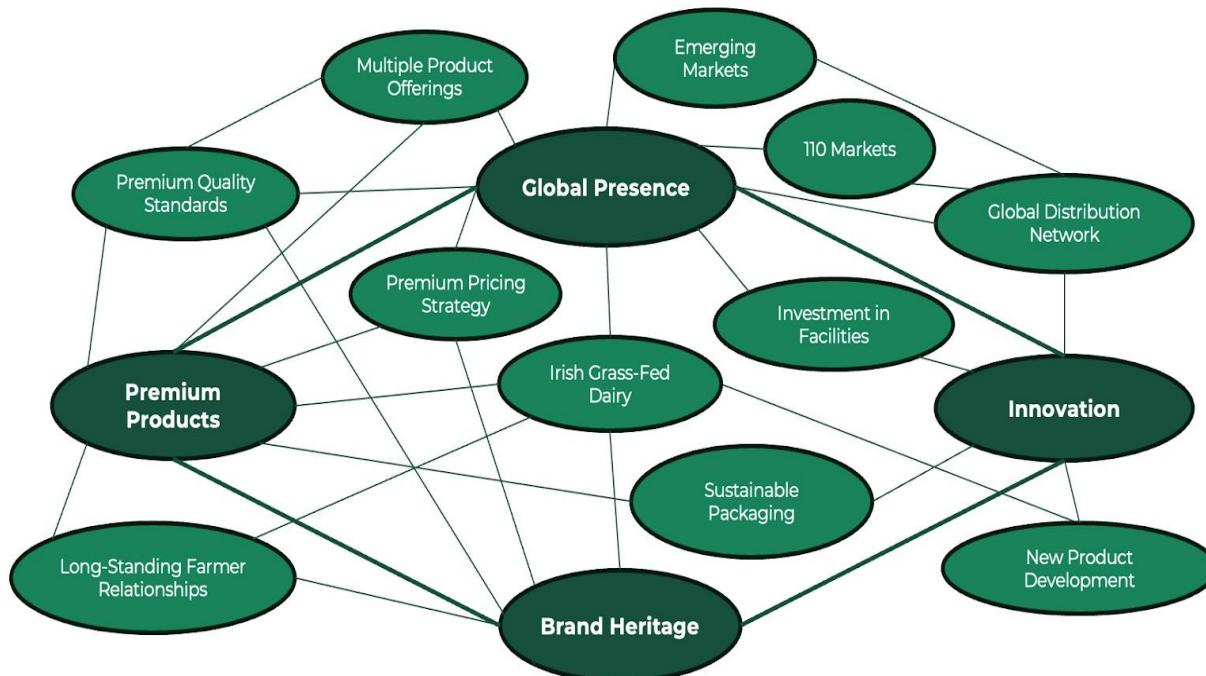


Figure 3b

Premium Products and Global Presence: A Symbiotic Relationship

Kerrygold's pursuit of excellence in premium products bolsters its global presence, forming a system that underpins its broad differentiation strategy. By adhering to strict quality standards and maintaining close, long-standing partnerships with Irish dairy farmers, Kerrygold guarantees an unrivalled taste profile in over 110 markets worldwide. These premium offerings thrive in diverse regions because a highly efficient global distribution network backs them. In turn, growing international demand stimulates further investment in modern processing facilities and logistics, safeguarding the brand's global appeal and preserving its high-end positioning (Intvw 1 & 2, 2025).

Brand Heritage and Innovation: Reinforcing Organisational Culture

Brand heritage interlocks with innovation to ensure that Kerrygold remains true to its Irish grass-fed legacy and is forward-focused. By celebrating the brand's Irish origin and rich dairy tradition, Kerrygold gains consumer trust with a commitment to R&D. Production facilities and sustainability projects (Ornua 2023b) drive new product development. This blend of tradition and modernity allows an organisational culture that values authenticity, fosters creative thinking, and encourages advancements.

Operational Synergies Across Cornerstones

Underlying all four cornerstones is a series of intertwined operations that strengthen Kerrygold's competitive edge (Teece et al. 1997). Sustainable packaging efforts, for example, depend on innovation to reduce environmental impact while reflecting the brand's heritage of ethically produced, premium dairy (Intvw 1 & 2, 2025). Simultaneously, the brand's global reach, supported by strategic product launches and a robust distribution network, benefits from consistent quality control, which is key to its heritage and ethos (Intvw 1 & 2, 2025). These operational links ensure that progression in any one area can be positive across the entire organisation, creating a cohesive system in which each cornerstone amplifies the impact of the others (Porter, 1996). Ultimately, this strategic fit across Kerrygold's operations enables the brand to stay resilient in an ever-evolving market.

3.3 Alignment of Strategy with Organisational Structure & Culture

The McKinsey 7s Framework was utilised to analyse Ornua's "organisational design" with particular emphasis on Structure and Culture. Such analysis was conducted to gain a broader perspective of the overall company view to be extended to cover Kerrygold as one of Ornua's key brands. This was achieved through the interaction of the seven elements by evaluating both 'hard' and 'soft' components. In addition, this framework was used to understand the critical role of coordination within the company to further understand Kerrygold's current strategy.

Shared Values

We have identified Ornua's shared values to include accomplishment from their core value of "achieving greater things", authenticity from the value of "being our true selves", achievement from their core value of "make it happen" and open-minded from the core value of "seek and embrace new ideas" (Ornua, 2024c). These shared values lie at the foundation of Ornua, fostering a sense of collaboration, a sense of care both internally and externally, and a sense of pride within the company. Such shared values play a critical role in aligning the remaining elements within the McKinsey 7s Framework.

Strategy

Kerrygold's differentiation strategy highlights its Irish dairy heritage, emphasising the use of grass-fed milk to establish itself as a premium brand (M. O'Donovan, 2017). This approach aligns closely with Ornua's cooperative model, where member farmers are essential to the supply chain, ensuring consistently high product quality and authenticity (Ornua, 2021). As Kerrygold is renowned worldwide for producing high-quality goods, it guarantees that its farmers will profit directly from its ongoing international expansion (Ornua, 2021).

Structure

Ornua's decentralised structure allows Kerrygold to expand internationally while considering the needs of each foreign market (Intvw 1 & 2, 2025). Kerrygold has adapted its operations to satisfy local customer needs, effectively manage supply chains, and adhere to regulations by granting regional subsidiaries and distribution centres greater autonomy (McHugh, 2024).

Systems

Ornua's operating systems are essential for improving sustainability, cost reduction, and productivity. The €40 million investment in the Kerrygold Park facility allows the production of over one million packs of butter every day (Ornua, 2023d). The facility's modern processing infrastructure and cutting-edge technology have improved supply chain efficiency, quality control, and resource allocation which in turn strengthens Kerrygold's position as an internationally competitive brand (Ornua, 2023d). Through its continuous R&D investments and its objective of having completely circular packaging by 2030, Ornua demonstrates its dedication to sustainability-driven innovation. This scheme is in line with changing EU regulations and growing customer demand for eco-friendly products (Ornua, 2023b). By creating environmentally friendly packaging options, Ornua is improving its brand reputation while minimising its environmental impact.

Skills

Within Ornua, training is essential for the firm, emphasising the importance of Ornua's ideology of "Grow Together, Achieve Together, Belong Together" (Ornua, 2024d). Ornua emphasises the importance of investing in its workforce to provide both technical and professional growth trajectories for all employees. The continuous learning culture emphasises the well-rounded and diverse skill set of the firm. Employees are encouraged to adopt leadership skills, innovative thinking skills and collaborative skills. Excellence in skills is adopted within Ornua's innovation, marketing, trading and continuous improvement dedicated centres (Ornua, 2024d).

Staff

Talent management is crucial within Ornua to reflect the firm's essence. Upon the development of Ornua's manufacturing plant, Kerrygold Park, 180 new employees were recruited to work across the plant and deliver high-productivity output (McHugh, 2024). Ornua credits the establishment of high productivity levels to the culture of continuous improvement. This recent expansion exploited the use of advanced technology, requiring extensive staff training and development, further enhancing the skills and abilities of employees within the facility.

Style

Ornua's style highlights inclusivity, acceptance and respect for all participants engaging with the company. This style is reflective of its organisational culture of "doing great things together". Ornua particularly emphasises diversity by adopting a culture that values a diverse workforce and supports equal opportunities for all employees (Ornua, 2024d). Ornua's attitude towards employee wellbeing is further testament to their style, emphasising the importance of respect for all employees. The positive results of such an organisational style were recognised in 2023 when Ornua became the first dairy company to achieve the Keep Well Mark accreditation, which supports companies in embracing corporate wellness (Ornua, 2024e).

3.4 Process of Engagement with Client Organisation

Senior executives of Ornua were interviewed to gain firsthand insights into the company's strategic direction, market positioning, and operational challenges. This engagement provided a comprehensive understanding of its business strategy, enabling a more informed analysis of its competitive landscape and growth opportunities. An interview with the former CEO covered more general strategic topics, like sales growth, global expansion, the effects of Brexit, and differentiation strategies. This conversation included a thorough rundown of Ornua's strategic goals and how it plans to overcome obstacles in the international dairy industry. An interview with the current CFO of Ornua took place in mid-February regarding Kerrygold's pricing strategy, sustainability initiatives, and market positioning. These discussions offered further insightful information about the business's operational strategy and decision-making procedures. Information acquired from these interviews was crucial in creating well-informed recommendations for Ornua.

4. Evaluation Stage

4.1 Alignment of Findings to Current Strategy

4.1.1 Market Dynamics

Ongoing global inflation and constantly rising input costs posed by Brexit create serious issues for Kerrygold (Intvw 1 & 2, 2025), compelling innovative strategic pivots to maintain profitability while staying competitive. Kerrygold strives to navigate increasing pricing pressures in a variety of ways, for example, through serving 26 new product offerings (Ornua, 2023b) and geographically expanding their market presence to the Middle East and Asia in 2023 (Intvw 1 & 2, 2025), to diversify their market portfolio, in turn reducing their concentrated reliance on brand leaders and hedging risk against key market failures. However, with Donald Trump determined to domesticate US production by threatening a blanket tariff against all importing countries, and the ongoing high costs incurred by supply chain disruptions in UK markets, Kerrygold must improve its strategy with responsive measures to prevent rising costs.

4.1.2 Research and Development

Kerrygold allocates substantial resources to R&D to ensure operational efficiency and leadership in sustainability, which underpin the company's differentiation strategy (Ornua, 2023b). They currently plan to invest additional funds into the Middle Eastern and Asian markets to further penetrate these growth areas (Intvw 1 & 2, 2025). Leveraging the network of operations that Kerrygold has developed over the past 60+ years will be crucial to ensuring that the expansion into these markets is effective. These markets represent key growth opportunities for Kerrygold, allowing the company to further distinguish itself and reinforce its competitive advantage, thereby enhancing its reputation as the leading butter brand globally. However, while investing in this venture, Kerrygold also needs to ensure that it maintains its sustainability goals at heart and doesn't forget about the key pillar.

4.1.3 Sustainability

Kerrygold shows a strong commitment to sustainability, as evidenced by its improved CDP rating and objective of achieving fully circular packaging by 2030. This goal aligns with the EU's climate objectives and reflects the increasing consumer demand for environmentally responsible practices (Intvw 1 & 2, 2025). However, as sustainability becomes an essential factor for competitive advantage within the agri-food sector (Porter and Kramer, 2011), further innovations must be pursued to mitigate emissions and improve energy efficiency throughout operations. Technological advancements, especially in energy management, are crucial for enhancing operational efficiency and minimising environmental impact (Seyedan and Mafakheri, 2020). By building upon its existing sustainability initiatives through innovative approaches, Kerrygold could solidify its position as a leader in sustainable dairy production and further differentiate itself while effectively meeting both regulatory and consumer expectations.

4.2 Recommendations for Strategic Growth/ Creativity/ Change

4.2.1 Recommendation 1: R&D- Regional Logistics Hubs

Building on Kerrygold's previous success in establishing its own logistics hubs in the US, we recommend replicating this strategy by implementing regional logistics hubs in key growth areas, specifically in the Middle East and Asian markets. Kerrygold's US-based hubs streamlined supply chain management, reduced dependencies on third parties, and strengthened direct relationships with retailers, enhancing brand presence and revenue growth (Intvw 1 & 2, 2025). Adopting a similar approach in the Middle East and Asia would allow Kerrygold to exercise greater control over its supply chain, reduce shipping times, and allow more control over product quality (Hwang and Kim, 2019). By consolidating supply chain operations in dedicated hubs, Kerrygold will facilitate direct communication with local retailers, ensuring that product attributes and premium quality are clearly conveyed (Masson, 2024). This will strengthen relationships with retailers, enabling greater market penetration and fostering brand loyalty, mirroring the success of the implementation of hubs in the US (Intvw 1 & 2, 2025). Managing the supply chain independently allows Kerrygold to respond more swiftly to retailers' needs, reducing delivery times and enhancing customer satisfaction (Ashcroft, 2023).

Although the initial setup costs for these logistics hubs may be high, the long-term benefits outweigh these expenses. A consolidated supply chain network not only enhances efficiency and reduces overheads but also helps retailers maintain adequate stock levels, minimising the risk of lost sales (The International Transport Forum, 2024). Furthermore, to align with Kerrygold's broader sustainability objectives, we propose integrating elements of AI-driven optimisation (which will be elaborated on in the final recommendation) into these hubs, facilitating predictive maintenance planning and ongoing process improvement. This approach will enable Kerrygold to replicate the proven advantages of its US operations while securing a competitive edge in emerging regions.

4.2.2 Recommendation 2: Market Dynamics- Gradual Price Increases

To address the issue of rising costs for Kerrygold created by current market dynamics while complementing Kerrygold's strategic approach to maintain profitability through diversification, we suggest a dual recommendation, simultaneously implementing preventative measures to reduce unnecessary costs stemming from Brexit legislation and introducing gradual price increases to offset inflationary costs as well as potential future tariffs.

Brexit has led to the introduction of new UK importing legislation and customs obligations, with additional requirements for agricultural products, such as the pre-notification of arrival for animal products (Central Bank of Ireland, 2024). To combat non-tariff barriers when exporting to the UK market, we recommend hiring border specialists, to ensure compliance with stringent customs inspections and maintain relationships with regulatory authorities. In addition, we suggest investing in specialised customs software, specifically SAP Global Trade Services (SAP, no date), streamlining customs declarations and documentation management. Combining expert knowledge and technological innovation in customs administration will prevent supply chain disruption and subsequent freight costs, in turn significantly reducing costs, and alleviating Kerrygold's primary Brexit concerns (Intvw 1 & 2, 2025).

To combat inflationary pressures and residual costs of required customs compliance, we recommend implementing gradual price increases in Kerrygold products, passing the additional costs onto the consumer in the form of higher prices. Kerrygold positions itself as a luxurious brand, currently charging premium prices reflecting its extensive commitment to quality production and equitable compensation to its dairy farmers. Kerrygold's intense brand loyalty in conjunction with their consumer's price insensitivity (Reference Interview), will prevent the loss of sales revenue resulting from the price increases. Establishing transparent and honest communication with consumers regarding the reasoning behind the gradual price increases is necessary and must be constantly implemented throughout. The similar reactionary measure of gradual price increases and stable revenue growth due to consumer price insensitivity and brand loyalty applies to the future possibility of imposed tariffs by the US, with evident data from Trump's previous presidential term confirming the majority of tariff burdens falling on the American consumers (The Economist, 2025).

4.2.3 Recommendation 3: Sustainability- AI-Driven Predictive Maintenance

Our final recommendation for Kerrygold is to implement AI-driven predictive maintenance throughout its production facilities, improving operational efficiency, minimising machine downtime, and reducing emissions. Predictive maintenance utilises real-time data and machine learning to detect when equipment is showing early signs of failure, allowing for timely interventions that mitigate energy waste and costly breakdowns (Banerjee et al., 2024). By maximising equipment performance, Kerrygold can drastically lower energy usage and position itself as a leader in sustainable dairy production, aligning with the shift in consumer preferences (Intvw 1 & 2, 2025).

With this implementation, it is essential to invest in extensive training programmes for current employees working on the production lines. This training should cover understanding predictive maintenance systems, interpreting AI-generated insights, and responding to automated alerts, ensuring that employees can effectively manage and maintain the new technology. Digital disruption often leaves workforces unprepared, highlighting the need for these structured training programmes (Newman and Gopalkrishnan, 2020).

In the long term, once credibility for AI-driven energy optimisation has been established in Ireland, Kerrygold should consider extending this technology to its international logistics hubs, bolstering supply chain efficiency and further reducing energy waste (Danishvar et al., 2022). By implementing the technology internationally after proven success locally, Kerrygold can effectively scale its sustainability efforts while commanding a consistent standard of operational excellence. Integrating AI-powered predictive maintenance with a comprehensive employee training programme can help Kerrygold attain coactive advantages, from streamlining operations and lowering energy usage to building an innovative culture with adaptable technological skills. This recommendation helps Kerrygold position itself as a leader in sustainable dairy production, enhancing its global competitiveness.

4.3 Roadmap for Recommendations

	0-6 Months	6-12 Months	12-18 Months	18-24 Months
Logistics Hubs	Conduct a feasibility study to find the ideal location cost of set up and begin the search for workers for the hubs	Begin construction and infrastructure development of hubs and begin training staff who are going to be in managerial positions		
AI-Driven Optimisation	Irish implementation of AI systems to monitor predictive maintenance and monitor energy consumption.	Performance evaluation of integration of AI systems	Integration of these systems into international facilities	
Price Adjustments	Begin upskilling employees in these new systems so they can understand and use them to better help their workflow	Optimisation of these systems based on employee feedback and evaluation of the performance of the machines		
	Implement a marketing campaign to show Kerrygold is a luxury product worth any price increases	Employee U.S. tariff specialists to optimise compliance strategies, minimise potential tariff costs, and mitigate financial impact		Evaluate the performance of UK and US trade specialists and the impact of gradual price increases and restructure plans if necessary
	Employee UK trade specialists and customs software to reduce the financial impact of UK sea border	Begin gradual price increases to offset the cost of inflation during production		

Figure 4a

Our roadmap visually outlines how Kerrygold can implement the three key recommendations, logistics hubs, AI-driven optimisation, and price adjustments, over distinct phases spanning a two-year timeline. In the initial six months, feasibility studies and planning are crucial: Kerrygold identifies optimal locations for regional hubs, begins installing AI monitoring systems in Ireland, and develops a marketing campaign to justify price increases. In months six to twelve, construction on logistics hubs commences, employees receive training on AI tools, and tariff specialists are recruited to navigate UK and US markets. As the period from month twelve to eighteen approaches, newly constructed hubs are integrated with AI tools to optimise distribution while staff evaluate AI performance and refine workflows. Finally, during months eighteen to twenty-four, Kerrygold expands AI deployment to international sites, solidifies price increases based on inflation and cost data, and reviews tariff strategies. This staged approach ensures gradual yet strategic improvement across operations, technology, and pricing.

4.4 Conceptualisation of Findings: SWOT

The below SWOT analysis offers a critical lens through which our proposed recommendations can be assessed, highlighting both their potential and the complexities they bring.

Internal	Strengths <ul style="list-style-type: none"> • Regional Logistics Hubs – reduce costs and enhance market penetration • AI-Integration – enhance efficiency, sustainability goals & competitiveness • Price Adjustments – offset inflation & tariffs while maintaining premium brand positioning 	Weaknesses <ul style="list-style-type: none"> • Implementation Costs – logistics hubs & AI integration entails high upfront investment • Expansion Risks – new markets require navigating cultural differences & complex regulations • Digital Disruption – potential employee resistance to change
External	Opportunities <ul style="list-style-type: none"> • Regional Hubs – provides supply chain agility, reducing reliance on long-haul shipments • Market Diversification – expansion to high-growth regions reduces dependency on EU & US markets • Sustainability Leadership – strengthens brand as leader 	Threats <ul style="list-style-type: none"> • Geopolitical Risks – unforeseen circumstances could disrupt logistics expansion plans • Regulatory Changes – increased regulations may increase operational costs • Data Breach – strong cybersecurity protocols necessary

Figure 4b

Introducing regional logistics hubs presents an opportunity to enhance supply chain agility and improve market penetration. This decentralised approach not only reduces operational costs but also supports quicker response times to local market demands, fostering stronger relationships with regional retailers. In parallel, the integration of AI-driven predictive maintenance within production facilities is a forward-thinking move that promises to optimise energy consumption, cut operational waste, and reduce carbon emissions, solidifying Kerrygold's stance as a sustainability leader in the dairy sector. Meanwhile, gradual price increases act as a pre-emptive measure, shielding the company from inflationary pressures and the looming threat of future US tariffs. However, the path to these benefits is layered with challenges. The financial burden of upfront investments in AI and new logistics infrastructure cannot be overlooked. A phased rollout of AI, starting with Irish operations, allows Kerrygold to assess tangible benefits before expanding internationally, reducing financial strain. Additionally, integrating AI into operations introduces potential employee resistance, a common challenge in digital transformation efforts. This can be countered through structured training programmes aimed at upskilling staff, helping them adapt to new technologies while preparing the workforce for future AI-driven initiatives.

Expanding into new regions brings regulatory complexities and cultural differences that require careful navigation. Employing local experts will help Kerrygold manage legal requirements and cultural nuances, ensuring smoother market integration. While price increases might initially stir consumer hesitation, Kerrygold's strong brand loyalty and clear communication can mitigate dissatisfaction. Ultimately, these strategies, if executed thoughtfully, offer Kerrygold a pathway to not only strengthen its operational resilience but also secure a competitive edge in the evolving global dairy market.

4.5 Alignment of Findings to Relevant Literature

Ornua's strategy aligns with competitive and sustainability frameworks, emphasizing differentiation (Porter, 1996). Research from the ECB, Teagasc, and The Economist (2025) informs pricing and trade policies. AI-driven efficiencies support supply chain advancements (Seyedan & Mafakheri, 2020), while Kerrygold's sustainable packaging strengthens its market position (Porter & Kramer, 2011). *See Appendix 2e. for further analysis of the literature reviewed.*

4.6 Team Reflection & Project Conclusion

During our strategic review of Ornua, with a focus on Kerrygold, we took a collaborative, hands-on approach, making the most of our team's diverse expertise in data analytics, finance, and operations management. Instead of relying solely on theory, we had in-depth discussions, critically examined Kerrygold's business model, and evaluated its market position and global expansion strategy. Our goal was to ensure that our recommendations were both practical and aligned with the company's long-term objectives. This process reinforced what strategy consulting is really about, bringing together different perspectives to create well-rounded, data-driven solutions for real-world business challenges.

Our team's key advantage was having direct access to Ornua's leadership. One of our team members had a close connection to the former CEO as well as the current CFO, who sits on the board of directors. This provided us with valuable insights into the company's internal strategy, giving us a deeper understanding of how leadership approaches key business decisions. These firsthand perspectives, combined with our secondary research, helped us develop recommendations rooted in real business dynamics rather than purely academic theories. By combining internal insights, industry research, and strategic frameworks from our coursework, we identified key opportunities and challenges related to Kerrygold's market expansion, premium product positioning, and sustainability strategy. Throughout this process, we remained aware of the potential influence of our own perspectives and prior knowledge. Recognising these biases was an important part of our approach, ensuring that our analysis remained objective, well-supported, and actionable.

Looking back, this experience has reinforced our appreciation for strategy consulting as a dynamic and evolving discipline. The process of evaluating complex business challenges, synthesising insights, and formulating strategic recommendations has provided us with invaluable skills that will serve us in our future professional endeavours. As we continue to grow as future consultants and business strategists, we remain committed to embracing new challenges, refining our methodologies, and continuously enhancing our ability to deliver impactful strategic solutions.

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Appendix 1

Appendix 1a. – Preliminary Literature Review

Understanding Strategy

To establish a thorough analysis of Ornua, a clear comprehension of strategy needed to be understood. To acquire a strategy is to have “an approach to overcoming critical obstacles and difficulties” (P.Rumelt, 2022). By reviewing academic literature, competitive strategy involves the unique ability of a company to be different, by deliberately choosing to create a set of activities to deliver a distinctive set of values (Porter, 1996).

Overview of Kerrygold’s current strategy

Through analysis of Ornua’s 2023 Annual Report, the firm is Ireland’s largest exporter of dairy products and owner of the Kerrygold brand, which maintained a stable performance with a turnover of €3.4 billion (Ornua, 2023b). Key strategic initiatives currently include brand growth, market expansion, sustainability commitment and member cooperative support. Interview results and diagnostics with Ornua’s former CEO and current CFO were also analysed to understand themes such as culture, issues and competitive landscape.

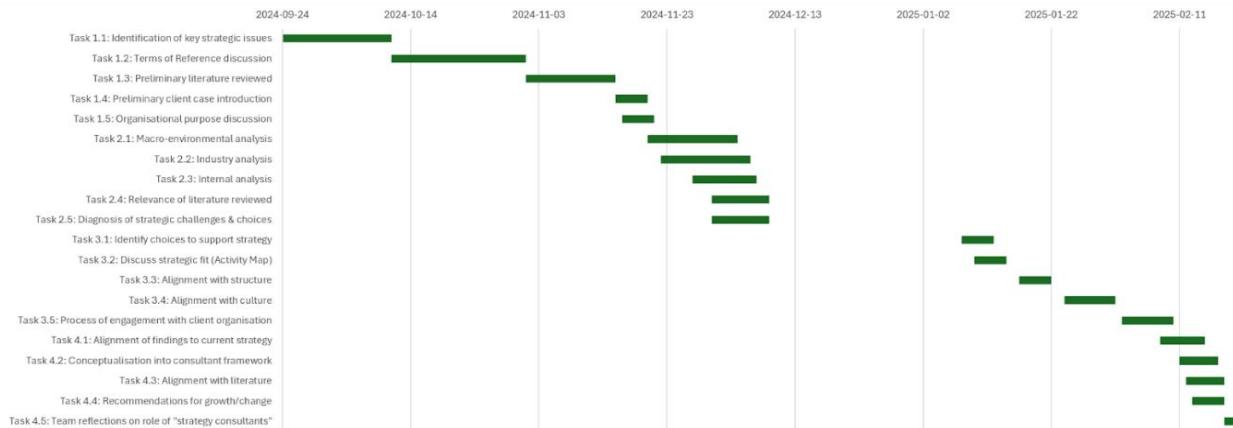
Overview of both the Irish Agricultural industry and country counterparts

Coherent research was obtained from the broader agricultural landscape in Ireland and abroad with a particular focus on dairy produce, established through industrial reports from Teagasc, along with market dynamic analysis from the European Central Bank and the European Union. Competitive analysis was achieved through company reports from Dairy Gold and Flora.

Kerrygold Recommendations

In leveraging recommendations for Kerrygold, strategic research was examined through innovational reports in the agricultural industry and sustainability reports from the Irish Government (Climate Action Plan). Expansion analysis was completed by reviewing FDA reports for the US and emerging market reports for the Middle East and Asia.

Appendix 1b. - Gantt Chart & Work Breakdown Structure



Deliverable	Team Member	Due Date	Status
Preparation Stage			
Client selection	Everyone	13/10/2024	Complete
Rationale of Study	David, Rory, Georgie	20/11/2024	Complete
Project Management	Conor, Mo, Eabha	20/11/2024	Complete
Key Study Activities	David, Conor, Rory	20/11/2024	Complete
Orientation Stage			
Task 1.1: Preliminary Client Case Introduction	Eabha	05/03/2025	Complete
Task 1.2: Organisational Purpose Discussion	Eabha	05/03/2025	Complete
Task 1.3: Identification of Key Strategic Issues	Rory	05/03/2025	Complete
Task 1.4: ToR Discussion	Conor	05/03/2025	Complete
Task 1.5: Preliminary Literature Review	Georgie	05/03/2025	Complete
Diagnostic Stage			
Task 2.1: Macro-environmental analysis	Conor	05/03/2025	Complete
Task 2.2: Industry analysis	Conor	05/03/2025	Complete
Task 2.3: Internal analysis	David	05/03/2025	Complete
Task 2.4: Relevance of literature reviewed	Georgie	05/03/2025	Complete
Task 2.5: Diagnosis of strategic challenges & choices	David	05/03/2025	Complete
Intervention Stage			
Task 3.1: Identify choices to support strategy	Rory	05/03/2025	Complete
Task 3.2: Discuss strategic fit (Activity Map)	Mo	05/03/2025	Complete
Task 3.3 & 3.4: Alignment with structure & culture	Georgie, Eabha	05/03/2025	Complete
Task 3.5: Process of engagement with client organisation	Eabha	05/03/2025	Complete
Evaluation Stage			
Task 4.1: Alignment of findings to current strategy	Rory, David, Conor	05/03/2025	Complete
Task 4.2: Recommendations	Rory, David, Conor	05/03/2025	Complete
Task 4.3: Roadmap for Recommendations	Rory	05/03/2025	Complete
Task 4.4: Conceptualisation of Findings	David	05/03/2025	Complete
Task 4.5: Team Reflection & Project Conclusion	Mo	05/03/2025	Complete

To track all work completion and ensure accuracy in accordance with deadlines, a Gantt chart and Work Breakdown Structure was created. Extra workload was allocated in the beginning of semester one leading up to Christmas. Stricter deadlines were created closer to the final submission date in semester two to ensure final completion. Such deadlines added time pressure to all team members, however, deadlines were produced in unison with other individual assignments to ensure each member had the sufficient time to complete their parts.

Appendix 1c. – Interviews 1 & 2 w/ Former CEO & Current CFO

Q. What would be the key strategic issues you are currently facing at Kerrygold?

- Sales growth
- International expansion into new markets
- R&D efforts to stay ahead of sustainability efforts
- International tariffs affecting the profitability of key markets

Q. What challenges has Brexit presented to Kerrygold for trade with the UK?

- It has made it much more difficult to export goods from Ireland, due to increased administration and bureaucracy
- Freight and distribution costs have increased significantly

Q. What are key growth markets for Kerrygold in the next 5-10 yrs, and how does the company plan to enter these markets?

- Middle East and Asia are key targeted growth markets due to the shortage of dairy supply in both continents.
- Plan for entry - they will be approached based on placing employees into the market, hiring credible distributors who invest in the brands within the market, and, in some instances, making acquisitions to give you ready-made in-market infrastructure.

Q. How does Ornua capture value in the global dairy market, and what sets it apart from competitors?

- The strength of its brand, Kerrygold, is globally renowned in most markets as being the number 1 brand
- Grass-fed Irish dairy with provenance and healthy connotations
- Irish heritage

Q. How does Kerrygold differentiate itself from both large multinational competitors and smaller, local dairy producers in key markets?

- The brand
- Innovation
- New product development
- International presence

Q. How does Ornua ensure that its current strategy aligns with its organisational structure and culture?

- Regular monthly board meetings with all representatives of the dairy industry, from business to cooperative to farming organisations and farmer reps, as Ornua develops its strategy each of these representative bodies have had an input to ensure everyone is aligned

Q. How has Ornua adapted its strategy in response to shifts in consumer demands, such as trends towards sustainability or plant-based products?

- In every key market around the world, Ornua does intensive customer and market research. It is constantly engaging with its day-to-day consumers and its key customers, whether it be retail or in food service. This ensures that Ornua stays on top of trends and changes that are shaping demand
- Increasing sustainability in every aspect of the business is a key priority – clear consumer shift for more environmentally friendly products

Q. How does Ornua evaluate the success of its strategic initiatives, and what metrics are most important?

- Every year there is a 6 monthly review of all its key initiatives at a strategic planning meeting with the top 30 executives globally. Every October there is a review of performance year to date with all of the board before a new budget is framed in November of each year

Q. What lessons has Ornua learned from its international expansion, particularly in balancing global reach with local market needs?

- Ornua has learned that every marketplace is different, and individual consumers have very different preferences

Q. How does Ornua align its strategy with organisational structure?

- In the ingredients sector, there is a head of foods and head of ingredients
- In the central function departments, such as risk, HR and finance, there is an executive in charge of each department
- Matrix organisational structure

Q. How does Ornua create an engaging positive employee culture

- Regular staff engagement surveys - 7.6/10
- Good incentives - maternity leave
- Creates lively atmosphere in office

Q. Would you say Kerrygold consumers are price-sensitive?

- Depends on what country you live in
- In Ireland and the UK – not price sensitive but slightly more than the US
- Compared to the US where butter quality is very different, charge 80% more in US, US citizens are not price-sensitive
- Kerrygold consumers are the wealthier consumers

Q. Has Ornua implemented technology into the running of facilities and production?

- Using AI to match invoices and free human capital up for other jobs
- Robotic handling equipment & advanced processing technology (butter churning) in Kerrygold Park

Appendix 2

Appendix 2a. - PESTLE Analysis

Political - Trade Policy

Kerrygold relies heavily on its ability to trade internationally, benefitting immensely from European Union (EU) participation, specifically EU free trade policies and efforts to remove trade barriers between member states to intensify the flow of goods between countries (European Union, no date). However, global political tension has the power to significantly impact Kerrygold's international sales and pricing, potentially reducing the company's global competitiveness. In the past, Kerrygold has suffered firsthand from political unrest, resulting from US tariffs of up to 25% imposed by President Trump on Irish dairy exports during 2019 stemming from aircraft subsidy disputes with the EU (Daly & Lawless, 2021), increasing the price of Kerrygold products in the US and severely impacting their ability to compete with domestically produced goods. The re-inauguration of President Trump creates potential hurdles for Kerrygold, as the threat of imposing a blanket tariff of 10% on all imports into the country (Haddad, M., 2024) as an attack manoeuvre during geopolitical tension with China, returns the company to a similar disadvantaged position of 2019. As the second most popular labelled refrigerated brand of butter in the US market with approximately €156 million in sales (Statista, 2024), navigating trade policy with the US is essential for Kerrygold operations.

Economic - Inflation & Global Supply Chain Disruption

With approximately 81% of businesses in the food and agriculture sector reporting an increase in total costs last year (IFAC, 2024), rising inflation costs in key markets and global supply chain disruption resulting from Brexit immensely contribute to Kerrygold's costs. Another consecutively positive yearly inflation rate in Ireland of 1% in 2024 (Eurostat, 2025), further exacerbates rising costs of production, packaging and ingredients for Kerrygold. Positive inflation rates in the company's major markets, including the US, EU and United Kingdom (UK), erode consumer purchasing power and reduce demand for the premium products offered by Kerrygold. Although the EU-UK Trade and Cooperation agreement outlines a tariff and quota-free trade agreement (European Commission, 2020), Kerrygold experiences non-tariff barriers trading with the UK.

Such barriers can include customs checks, administrative and documentation requirements, leading to shipping delays of imported materials and exported products across the Irish Sea, resulting in increased freight and distribution costs, which negatively impact Kerrygold's ability to sufficiently satisfy and compete in UK markets. The general weakening of the British Pound Sterling post-Brexit (European Central Bank, 2025) signifies the economic uncertainty of the UK's trading future with the EU, creating a less favourable trading environment for Kerrygold as their products become more expensive in UK markets.

Sociocultural - Animal Welfare and Ethical Farming

Kerrygold captures value in international markets through the strength of their brand being globally renowned for upholding the highest standard quality of ingredients and production process. All Kerrygold farmers are SDAS certified, ensuring a superior standard of milk production, through tight controls in traceability, environmental protection and food safety. In 2023, the Kerrygold Standard incorporated the ICOS Calf Welfare Charter, which sets out the welfare standards of Irish animal care and the protection and integration of calves apply to all calves produced on Irish dairy farms (Ornua, 2023c). Upholding these standards of ethical farming and animal welfare is crucial for Kerrygold, as negative publicity or scrutiny can impact its brand image and subsequently its level of sales in any market.

Technological – Innovation

The realisation of the importance of technological innovation in the agricultural landscape has become widespread, with the necessary combination of technology and agricultural entrepreneurship at the forefront of agri-business growth and development (Singh, 2014). Kerrygold appreciates the value of innovation, investing €40 million in the development of Kerrygold Park, their flagship butter production facility, equipped with cutting-edge processing technology and infrastructure, producing over one million packs of butter a day to serve 60 markets globally (Ornua, 2023c). Constant investment in research and development allows Kerrygold to drive market expansion, launching 26 new Kerrygold products and product extensions in 2023, along with a major global marketing campaign which reached up to 150 million consumers in its first 12 months (Ornua, 2023c).

Legal - Environmental and Food Safety Legislation

Producing in the Irish market and operating in several distinct global markets, Kerrygold must adhere to stringent legislation across a variety of sectors, to guarantee lawful manufacturing and trading transactions worldwide. Nationally, Kerrygold must abide by several environmental legislations, such as the Climate Action Plan 2024, set out by the Irish Government to limit greenhouse gases and sectoral emissions (Government of Ireland, 2024). Internationally, Kerrygold must obey numerous health and safety regulations in relation to production and packaging, for example, the US Food and Drug Administration (FDA) set the legal requirements outlining the standards to be met for safe consumption (FDA, no date). Failure to comply with rigid regulations may result in legal action, considerable fines and operational disruptions. Kerrygold currently faces such consequences in a class action lawsuit, failing to dismiss allegations of using potentially harmful cancer-linked per-and poly-fluoroalkyl substances in packaging, resulting in the recalling of all Kerrygold products from the affected markets (Pollock, 2024).

Environmental - Product Packaging & Pasture-Based Farming:

The Food Vision 2030 Strategy for the Irish agri-food sector, introduced by the Irish government, sets out a ten-year strategy to transform Ireland into a world leader in Sustainable Food Systems. This strategy ensures the production of safe, nutritious and high-value food while protecting and enhancing the country's natural resources to provide the basis for the sector's future competitive advantage (Government of Ireland, 2022). Many similar standards and strategies exist in the agri-business environment, which Kerrygold are required to follow to protect its brand reputation and maintain its market power. Failure to cooperate with stringent standards is costly to the company, in the form of reduced consumer demand and a subsequent loss in revenue. In the aim of reducing waste in line with government strategy, Kerrygold has committed to achieving fully circular recyclable on-shelf packaging that is responsibly sourced by 2030 (Ornua, 2023c). Kerrygold is also committed to providing high-quality products using pasture-based systems to fuel their cows with Irish grass and minimal supplementary feed (Kerrygold, no date), producing lower carbon emissions, preventing soil erosion and promoting biodiversity as a result.

Appendix 2b. - Porters Five Forces

Bargaining Power of Suppliers - Low to Moderate

Kerrygold benefits from a low concentration of suppliers, reliant on over 14,000 different dairy farming families to build their collection of raw ingredient inputs (Ornua, 2023b). The abundance of suppliers reduces their negotiating ability to demand higher prices, as Kerrygold can switch to alternative competitors rather easily. However, Kerrygold relies on pasture-based farming systems in which the animals are grass-fed with minimal additional supplements (Kerrygold, no date), increasing the bargaining power of suppliers through their unique high-quality provision of input. Although Kerrygold rely heavily on superior milk as their primary input, limiting their flexibility to negotiate during times of disrupted supply or scarcity, dairy suppliers are reliant on the brand as a main source of revenue, maintaining their low to moderate level of bargaining power as a result.

Threat of Substitutes – Moderate

Kerrygold positions itself as a premium product, charging a higher price for a prime quality product by emphasising its superior Irish grass-fed production methods. This strategic pricing approach creates the potential opportunity for competitor brands to undercut Kerrygold and offer a price-quality trade-off alternative, attracting market share with low switching costs to consumers of changing brands. In retaliation to competitor popularity, Kerrygold contested a similar Irish butter brand, Tipperary, on the grounds of trade dress infringement, failing to condemn the substitute product with their deceptive business practices claim (Cadogan, 2024). The increasing health consciousness of consumers in recent years is driving the consumption of butter alternatives, such as plant-based products produced by Flora (Flora Food Group, no date). Kerrygold must adhere to sustainable initiatives and continue to deliver on its promise of ethical production to maintain its powerful brand image and protect its market share.

Potential of New Market Entrants – Low

As the first Irish food brand to exceed €1 billion annual retail value (Ornua, 2019b), the economies of scale achieved by Kerrygold are remarkable. Competing with the established brand as a new company on price or efficiency is extremely difficult, without even accounting for Kerrygold's ability to set temporarily predatory prices and drive new entrants out of the market. Kerrygold has created an extensive global distribution network of suppliers and retailers, meaning new market entrants must compete within international markets to challenge the well-established brand. The substantial amount of capital investment required to compete on a global scale is a deterrent for potential market entrants. Intense legal barriers prevent the ease of access of market entrants, as regulatory bodies impose stringent standards and requirements concerning food safety certification and labelling.

Bargaining Power of Buyers – Moderate

Kerrygold operates in a variety of markets, supplying numerous retailers with mass volumes of their products, with many markets actively dominated by a small number of supermarket chains. Consequently, a limited number of retailers suggests a relatively disproportional spread of buyer power, like the UK market, led by a handful of integrated store groups controlling most of the market and creating a concentrated buyer side (Dobson *et al.*, 2001). This high level of concentration offers retailers considerable leverage during negotiations with Kerrygold, potentially leading to the demand for larger discounts or preferential deal terms. The buyers cannot credibly threaten to backwardly integrate because of the substantial barriers to entry into the dairy industry, but the threat of switching to competitor brands is substantial. To prevent buyer dissatisfaction, Kerrygold must value their retailers and manage relationships personally and effectively, to maintain valuable networks and continue to generate revenue for the brand.

Rivalry of Competitors – Moderate

Kerrygold competes with similar dairy-producing brands at national and international levels. Nationally, Dairygold poses as the brand's prominent rival, exporting to over 50 markets globally and turning over €1.4 billion in revenue during 2023 (Dairygold, 2024). A Danish brand, Lurpak, challenges Kerrygold on an international stage, competing with a premium butter brand, producing at the highest quality with an intense emphasis on natural ingredients (Lurpak, no date). The combination of the threat of substitute products and the bargaining power of buyers creates an intricate dairy market for Kerrygold to navigate. Fortunately, Kerrygold's powerful brand identity, along with its loyal customer base, facilitates its market domination. Kerrygold's ongoing marketing efforts highlighting their Irish grass-fed and sustainable production methods, in addition to maintaining valuable buyer and supplier relationships, will contribute to their continued market success.

Appendix 2c. - VRIO Analysis

Valuable

Kerrygold's premium quality dairy products are valuable due to the unique combination of Ireland's ideal climate for grass-fed farming and the brand's reputation for excellence. As a valuable resource, Kerrygold capitalises on the growing global demand for high-quality, natural, and sustainable food products. This aligns with the findings of Barney (1991), who asserts that a resource is valuable if it enables a firm to exploit opportunities or neutralise threats in its environment. Kerrygold's commitment to grass-fed dairy farming provides significant value and differentiates it from competitors by appealing to both health-conscious consumers and those with an interest in sustainability.

Rare

Its grass-fed dairy system is rare within global markets. Many competitors rely on conventional farming methods, whereas Kerrygold differentiates itself by emphasising its unique farming approach. Grass-fed dairy farming is still not the norm globally and gives Kerrygold a competitive edge in global markets. It allows them to position themselves as a high-quality, environmentally responsible brand. For a resource to be rare, it must not be widely possessed by competitors, which gives Kerrygold a distinctive advantage in the premium dairy segment (Barney, 1991).

Imitable

Despite the inherent value and rarity of Kerrygold's Irish grass-fed dairy practices, it may be somewhat imitable. While other competitors may adopt these practices, replicating Kerrygold's brand reputation and historical legacy presents a significant challenge. Its long-standing relationships with 14,000 dairy farming families (Ornua, 2023b) and premium brand utilising the rich quality of Irish milk serve as large barriers to imitation. While the farming method itself is not easily protected by intellectual property, the overall combination of brand reputation, quality, and sustainable practices gives Kerrygold a competitive advantage that is difficult to replicate, allowing them to dominate international markets.

Organised

Kerrygold's ability to organise and capitalise on its resources is evident within the operational structure, which is designed to support the production, marketing, and distribution of its high-quality dairy products. The company's strong marketing strategy has been effectively leveraged to reach international markets. New omni-channel advertising campaigns saw Kerrygold reach its highest-ever Brand Power score during the 2023 year, illustrating the strong brand image and positive consumer sentiment (Ornua, 2023b). The brand's robust distribution networks and efficient production systems ensure that its products reach a broad consumer base, making its valuable, rare resources more effective in achieving sustained competitive advantage.

Appendix 2d. – Relevance of Literature Reviewed

The reviewed literature provided an array of valuable insights for the strategic analysis of Ornua. The outlined definitions of strategy were aligned to the agricultural sector within Ireland to gain a comprehensive understanding of Ornua's strategic fit within the Irish dairy sector. Ornua's published reports provided a coherent understanding of current operations and challenges. Industrial Reports from Teagasc provided market trends for dairy produce outlooks. European Central Bank and the European Union analysis identified trade policies and exchange rate uncertainty. Competitive analysis from Dairy Gold and Flora identified other key market players. Innovational reports in the agricultural industry were sustained to leverage future recommendations. Sustainability reports, such as the Irish Government Climate Action Plan, provided recommendations to support and target sustainable goals or strengthen environmental commitments. FDA reports for the US and emerging market reports for Asia and the Middle East, provided insights for expansion analysis of external markets recommendations.

Appendix 2e. - Alignment of Findings to Relevant Literature

The findings support competitive, strategic, and sustainability frameworks and are in accordance with previous research. Ornua's growth and product innovation demonstrates how differentiation is essential to competitive strategy, as highlighted by Porter (1996). According to P.Rumelt (2022), strategy is defined as goal-directed efforts to maintain superior performance, which is consistent with Ornua's improved logistics and market diversification. Ornua's strategic stance is informed by research from the European Central Bank and Teagasc, which contextualises Ireland's dairy industry and trade policy. According to Porter and Kramer (2011), Kerrygold's circular packaging objectives demonstrate sustainability as a competitive advantage. AI-powered efficiency suggestions complement Seyedian and Mafakheri's (2020) focus on supply chain management technology breakthroughs. Economic evaluations of tariffs and Brexit also justify pricing modifications (The Economist, 2025). In the face of changing economic and environmental difficulties, these alignments guarantee Ornua's competitiveness in international dairy markets by validating its strategy and highlighting prospects for innovation.

Appendix 3

Appendix 3a. - Team Contract

Team Contract

Team Name: Synergy Solutions

Team #: BS 14

Team Members:

1) Mohsin Orkeldeen (21454014)

2) David Byrne (21325186)

3) Georgina Collins (21389656)

4) Éabha Coleman (21754965)

5) Rory Mulhern (21311696)

6) Conor O'Leary (21323801)

Team Procedures

1. Day, time, and place for regular team meetings:

When aligning our schedules, we identified Wednesday afternoon at 2pm, following the Business Strategy lecture, as our weekly meeting time. We will meet in the DCU library, with our team leader responsible for booking a library room each week during our designated meeting time. Every week, we will analyse the previous work completed by each team member, assess our method of best approach, and distribute the required workload for the coming week.

2. Preferred method of communication:

Our preferred method of communication is in person meetings, as this is our most productive environment for effective collaboration. To supplement meetings, we will organise online Zoom calls, to facilitate any necessary additional issues that arise between weekly meetings.

3. Decision-making policy:

We will make decisions based on the majority vote of the group, with the final say of our team leader deciding the course of action when the vote is split evenly. We utilise this method to ensure each team member has a fair contribution to each decision. We will hold our group meetings to facilitate the decision-making process, allowing each individual to express their opinion and respond to alternative opinions.

4. Method for setting and following meeting agendas:

When setting the agenda for a meeting, we will create a shared document for each team member to outline relevant points that need to be addressed in the upcoming meeting. Our team leader is responsible for reminding team members to submit their agenda points prior to the meeting, and ensuring we follow the agenda schedule during the meeting to discuss each point. Each meeting, we will rotate the responsibility of taking notes on topics discussed and decisions made amongst the team, with the same individual responsible for keeping the meeting on track and preventing unproductive communication.

5. Method of record keeping:

Each week, the responsibility for record keeping during the meeting will be rotated amongst all team members, to ensure a fair distribution of workload. The minutes will be finalised and disseminated after the meeting amongst all team members via a shared document, which is primarily kept to record all meeting information and minutes.

Team Expectations

Work Quality

1. Project standards:

Upon the formation of our team, we all agreed on upholding the highest possible standard of work throughout the entirety of the assignment. We collectively agreed on striving to achieve a top grade in our submissions. We will follow a variety of methods to ensure this, including regular peer review of submitted work with constructive feedback, writing several draft pieces before finalising individual contribution pieces, and frequent presentation practice with constructive criticism from team members. Our shared document allows for comment sharing on individual contribution pieces, with constructive communication as a key metric in reaching our highest potential and achieving our shared goal.

2. Strategies to fulfil these standards:

- Establish clear communication channels with regular meeting and check-ins to ensure everyone is working collaboratively
- Setting distinct tasks and deadlines to ensure progress
- Revising and peer-reviewing each other's work while offering constructive feedback
- Use share documents to ensure collaboration
- Schedule regular presentation practice sessions while offering constructive criticism
- Create an environment of accountability, setting high expectations for work quality

Team Participation

1. Strategies to ensure cooperation and equal distribution of tasks:

To ensure equal distribution of workload, we will split the report into sections based on wordcount and weighted external activities based on the amount of effort required to complete them. We will split the report into equal sections, with group members that are presenting being given slightly less workload in the report, to ensure fair distribution of effort. Our group member responsible for external interviews will also take on slightly less writing of the report, as their primary responsibility is gathering primary data for the group to utilise. We will create an environment of open communication to ensure all team members receive an equal workload, encouraging team members to identify any possible imbalances in workload that require redistribution.

2. Strategies for encouraging/including ideas from all team members (team maintenance):

We will create an open environment to foster collaboration, encouraging all team members to contribute their ideas ensuring there is no judgement or negative responses. We will constantly emphasise the importance of constructive feedback and delivering criticism in a constructive way. If team members do not feel comfortable contributing in front of the group, our team leader will facilitate one one-on-one communication to ease the pressure, before presenting the contributed idea to the group.

3. Strategies for keeping on task:

- Establish shared goals and objectives, while regularly readdressing goal alignment
- Creating a detailed timeline, with distinct deadlines ensuring we were working on schedule
- Breakdown the workload into smaller manageable tasks evenly distributed across members
- Start each team meeting with individual task updates from each team member
- Encourage motivation between team members and a helping environment if a team member becomes overwhelmed or overloaded with work

4. Preferences for leadership:

We will follow a formal leadership style, as agreed upon in the initial development of our project group. We selected a team leader, accountable for organising tasks, making final decisions, and overseeing the progress being made.

Personal Accountability

1. Expected individual attendance, punctuality, and participation at all team meetings:

All team members are expected to attend every meeting, on time, with full contribution and participation throughout. Of course, situations can occur that prevent individuals from attending organised meetings which is completely understandable, in this case, team members are expected to notify group members of their inability to attend and take the responsibility to familiarise themselves with the minutes after the meeting. If any discrepancies arise, the individual who could not attend is expected to reach out to group members and gain any information necessary.

2. Expected level of responsibility for fulfilling team assignments, timelines, and deadlines:

All team members are expected to fulfil their assigned duties and responsibilities to the highest possible standards, within the agreed timeline. If a situation arises where this is not possible, individuals are expected to communicate the issue with team members with an updated agenda on their planned completion of the task.

3. Expected level of communication with other team members:

Effective communication is expected by all group members throughout the entirety of the project, with any issues arising to be thoroughly communicated across all team members. Constant communication is essential to prevent any conflict amongst members.

4. Expected level of commitment to team decisions and tasks.

All team members are expected to contribute their opinions to each decision-making process, maintain full commitment to assigned tasks and always submit their work to the highest possible standard. Of course, we respect that individuals have ongoing workloads in other modules, with exceptions to temporary commitment levels to be made when deemed necessary.

Consequences for Failing to Follow Procedures and Fulfil Expectations

1. Describe, as a group, how you would handle infractions of any of the obligations of this team contract:

In the event of a team member violating the obligations set out in this contract, the situation would be handled in the following manner. Firstly, our team leader would organise a private meeting with the individual to discuss the issue and highlight the violation, giving the team member an opportunity to address the discrepancy and amend the situation. Secondly, if the individual continued to operate at a subpar level, the issue would be addressed in a group meeting with the opportunity to correct the inadequate commitment to the team. (Continued in following question)

2. Describe what your team will do if the infractions continue:

Finally, if the infractions continue, our team leader will have no choice but to report the situation to our module co-ordinator, as continued violation of the obligations of the contract is unfair to all team members involved in the project.

- a) I participated in formulating the standards, roles, and procedures as stated in this contract.
- b) I understand that I am obligated to abide by these terms and conditions
- c) I understand that if I do not abide by these terms and conditions, I will suffer the consequences as stated in this contract.

Name:	Date:	Signed:
Conor O'Leary	11/10/2024	<i>Conor O'Leary</i>
Éabha Coleman	11/10/2024	<i>Éabha Coleman</i>
Mohsin Orkeldeen	11/10/2024	<i>Mohsin Orkeldeen</i>
David Byrne	11/10/2024	<i>David Byrne</i>
Georgina Collins	11/10/2024	<i>Georgina Collins</i>
Rory Mulhern	11/10/2024	<i>Rory Mulhern</i>

Appendix 3b. - Interview Consent Form 1

Dear Donal Buggy,

As part of my degree in Business Studies, I am conducting a strategic review of Ornua and specifically Kerrygold. I am investigating this in part fulfilment of our Business Strategy module. I am inviting you to be a part of my study because of your role in Ornua as CFO.

If you accept, you will be asked to participate in an interview with Eabha Coleman. No one else will be present unless you would like someone to accompany you. Eabha Coleman will record the information you give by notes. No one else will have access to this information. The notes will be stored on a secure folder and stored under lock and key on the students laptop. All data collected will be destroyed when the student completes their degree. All submitted work is subject to University guidelines on data storage and privacy-assignments are stored for one year in a secure environment and destroyed by DCU after one year.

The questions will cover research and development, market dynamics and general questions. If there is a question you'd rather not answer, I will move to the next one. Please note that participation is entirely voluntary and that it is possible to withdraw at any stage. If you have any concerns about the study, please feel free to contact the module coordinator Dr. John Loonam (john.loonam@dcu.ie).

I would like to thank you for taking the time to read this letter. If you would like to know more about my study before deciding whether to participate, please contact me at eabha.coleman24@mail.dcu.ie.

Yours Faithfully,

Eabha Coleman.

Interviewee Signature:



Appendix 3c. - Interview Consent Form 2

Dear Kevin Lane,

As part of my degree in Business Studies, I am conducting a strategic review of Ornua and specifically Kerrygold. I am investigating this in part fulfilment of our Business Strategy module. I am inviting you to be a part of my study because of your previous role in Ornua as CEO.

If you accept, you will be asked to participate in an interview with Eabha Coleman. No one else will be present unless you would like someone to accompany you. Eabha Coleman will record the information you give by notes. No one else will have access to this information. The notes will be stored on a secure folder and stored under lock and key on the students laptop. All data collected will be destroyed when the student completes their degree. All submitted work is subject to University guidelines on data storage and privacy-assignments are stored for one year in a secure environment and destroyed by DCU after one year.

The questions will cover research and development, market dynamics and general questions. If there is a question you'd rather not answer, I will move to the next one. Please note that participation is entirely voluntary and that it is possible to withdraw at any stage. If you have any concerns about the study, please feel free to contact the module coordinator Dr. John Loonam (john.loonam@dcu.ie).

I would like to thank you for taking the time to read this letter. If you would like to know more about my study before deciding whether to participate, please contact me at eabha.coleman24@mail.dcu.ie.

Yours Faithfully,

Eabha Coleman.

Interviewee Signature:

A handwritten signature in black ink that reads "Kevin Lane".