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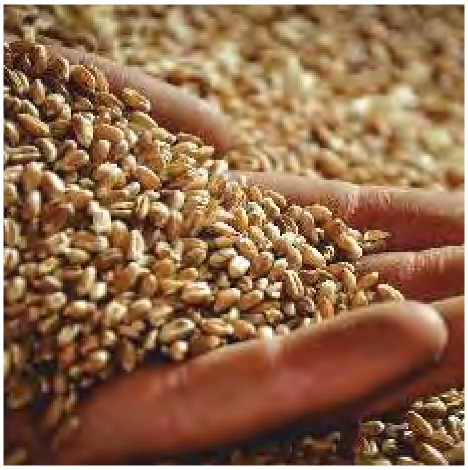

The Impact of the UK Referendum on Membership of the European Union on the Irish Agriculture, Food & Fisheries Sectors

Submission by the Agriculture and Food Committee
of the British Irish Chamber of Commerce

British Irish Chamber of Commerce, 3rd Floor, Newmount House
22-24 Lower Mount Street, Dublin 2
T: +353 (0) 1 400 4300 | E: info@britishirishchamber.com | W: britishirishchamber.com

CHAIRMAN'S FOREWORD

From as far back as the 12th century, the UK has been Ireland's most important export market and trading partner for agri-food products. Today, this strong trading relationship is evidenced by the fact that the UK remains by far the biggest importer of Irish agri-food representing 47% of total Irish agri-food exports amounting to €5.1bn in 2015 (CSO, 2016).

The agri-food sector is Ireland's largest indigenous industry employing around 250,000 people including 100,000 family farms. Irish food and drink is sold in more than 175 markets worldwide and Irish agri-food exports amount to €10.8bn.

Despite Ireland being the biggest source of the UK's food imports in relation to beef and dairy, agri-food trade between Ireland and UK is not one way traffic. Ireland imports in the region of €4bn per annum of agri-food products from the UK, representing 54% of all Irish agri-food imports (Teagasc, 2015). In manufacturing terms, the food and beverage sector imports over 45% of their production materials from the UK. A significant proportion of this trade is cross-border trade with products such as milk, beef and cereals often being produced in one part of the island of Ireland and transported across the border for processing. The sector is one of the most integrated on the island and the ability to trade freely is critical to this.

As the UK prepares to leave the EU, Prime Minister May has indicated that this means the UK will exit the single market and will not be bound by the customs union in its current form. She has also set out that Britain wants "A comprehensive, bold and ambitious free trade agreement with the EU" from the upcoming exit negotiations.

It is imperative that the agri-food sector forms a key part of any free trade arrangement between UK and EU. The reality is that UK is a net importer of food and Ireland is a net exporter; in light of ongoing sustainability and environmental challenges and an increased focus on quality and provenance, the existing trading relationship should be prioritised and supported by all parties to negotiations.

The agri-food committee at the British Irish Chamber of Commerce is comprised of business leaders that operate and trade extensively in the British/Irish sphere. This Committee is fully committed to engaging with all the stakeholders to ensure that the new relationship between the EU and the UK will continue to facilitate and promote agri-food trade between Ireland and Britain.

I would like to take this opportunity to thank all the members of the Committee who contributed to this paper and to the secretariat of the Chamber for its ongoing support.

Maree Gallagher

THE CURRENT IRISH- UK TRADING RELATIONSHIP
in relation to Agriculture, Food and Beverage

The agri-food sector is Ireland's largest indigenous industry. It employs around 250,000 people including 100,000 family farms. Irish food and drink is sold in more than 175 markets worldwide. Irish exports in the agri-food sector amount to €10.8bn, however the UK remains by far the biggest importer of Irish agri-food representing 47% of total agri-food exports amounting to €5.1bn in 2015 (CSO, 2016). To put this into perspective, the other 26 countries of the EU represent 31% of Irish exports or €3.4bn, the rest of the world represents 22% of Irish agri-food exports or €3bn (Bord Bia, 2015)

The importance of exports to the agri-food sector cannot be overstated given that Ireland exports 90% of its production; any curtailment of Ireland's biggest export market would have very serious consequences for the sector. Irish agri-food exports account for one third of Ireland's total exports to the UK and Ireland is the biggest source of the UK's food imports in relation to beef and dairy. Ireland also imports a significant amount of agri-food products from the UK in the region of €4bn per annum, representing 54% of all Irish agri-food imports (Teagasc, 2015). In manufacturing terms, the food and beverage sector imports over 45% of their production materials from the UK. Irish agri-food exports to the UK increased by 7% between 2014 and 2015- although the weakening of the Euro against the Sterling would have improved Ireland's competitiveness in this regard. Given the importance of the UK in relation to agri-food exports, it is evident that this sector will be disproportionally impacted as a result of the UK leaving from the European Union. Details on Irish agri-food exports to Britain and Northern Ireland are illustrated in Table 1:

Table 1: Irish Agri -Food Exports 2015

Commodity	Total	GB	NI	GB%	NI%
Live animals	430,508	239,642	100,106	56	23
Meat & meat preparations	3,499,812	1,720,791	182,325	49.2	5.2
Dairy products & birds' eggs	1,786,785	705,217	65,848	89.5	3.7
Fish	567,600	48,605	8,721	8.6	1.5
Cereals & cereal preparations	402,868	268,925	84,822	66.8	21.1
Vegetables & fruit	286,649	193,270	52,613	67.4	18.4
Sugar, sugar preparation & honey	162,406	42,885	6,497	26.4	4
Coffee, tea cocoa, spices & manufactures	372,412	240,210	16,120	64.5	4.3
Feeding stuff for animals	295,831	157,396	65,751	53.2	22.2
Miscellaneous edible products & preparations	2,072,966	297,204	12,042	14.3	0.6
Beverages	1,240,058	223,776	89,346	18	7.2

Source: CSO Brexit Ireland and the UK in Numbers'

A scoping note carried out by the ESRI on the potential impact on trade from a Brexit estimated that the potential reduction in bilateral trade flows between the UK and Ireland could be as high as 21.6%, with an even greater impact on the agri-food sector. Teagasc tested four scenarios post Brexit from the smallest impact to the largest which showed that the reduction in Irish agri-food exports ranged from 1.4% (€150m) to 8% (€800m).

THE CURRENT IRISH- UK TRADING RELATIONSHIP

Post the Referendum

The most immediate impact on the trading relationship with the UK was the declining value of Sterling against the Euro in the aftermath of the referendum result. On June 22, the Pound was trading at one Euro and thirty cent, immediately after the result it fell to one Euro and ten cent, it is currently (16 December, 2016) trading at one Euro and nineteen cent. Until a resolution is agreed between the EU and the UK in light of Brexit, it can be assumed that the Euro's strength against the pound will remain high and possibly rise again. The consequence of this will impact on the competiveness of Irish exports while being beneficial to UK exports. Only on the conclusion of negotiations will we have a clearer picture of a stable exchange rate between the two currencies.

The slide in Sterling has already had a direct impact on the mushroom industry in Ireland with many firms having already closed down. This occurred as Irish mushroom companies typically agree fixed price contracts up to 12 months in advance with their UK customers. For most growers this was done when Sterling was trading at approximately £1 vs €1.40 an (average for the second half of 2015). With the dramatic drop in the value of the Sterling mushroom growers' margins were effectively wiped out. This effect is now spreading to the beef industry where the price per kg has fallen from €4.10 in June to €3.65 in November – this works out at a loss of approx €200 per head for the producer. Analysis carried out by Ibec on the relationship between exchange rates and Irish agri-food exports indicates that a 1% weakening in Sterling results in a 0.7% drop in Irish exports to the UK, should the Sterling weaken to £0.90, it could result in export loses in the region of €700m and potentially 7,500 jobs (Ibec, 2016).

According to Bord Bia's survey of Irish Food and Drink exporters, six out of ten firms cited exchange rate volatility as their over-riding concern (Bord Bia, 2016). In terms of investment sentiment, the prevailing mood is uncertainty on the implications of Brexit on agri-food trade. The same survey indicating that four out of ten firms expect their sales to decline, three out of ten expect them to remain unchanged and three out of ten unaware how it will impact them. The Chamber's business survey carried out in October reflected similar trends as Bord Bia's survey. The results of the Chamber's survey found that, 73% of firms needed clarity of Brexit terms in order to deal with the effects of Brexit while 63% said they were in need of unbiased information. The view of the British Irish Chamber's Agri-Food Committee is that while uncertainty is prevalent, firms will curtail investment into the agri-food sector and will maintain a cautious approach for the short to medium term.

It is important to bear in mind that the negotiations on the UK's exit from the EU and the agreement of a new UK–EU trading relationship are two distinct processes. If on culmination of negotiations the EU and the UK do not agree a free trade agreement, then their trading relationship will likely revert to the World Trade Organisation's (WTO) 'most favoured nation' (MFN) rule. In general this rule means all trading partners must be treated equally for example, if the UK places a tariff on beef it would likely be the same for Argentina as it would be for Ireland. Key exemptions are allowed; two or more countries can set up a free trade agreement that applies only to goods traded within the group. When looking at possible WTO tariffs it is important to take into account the difference between 'Bound Tariffs' and 'Applied Tariffs'. The Bound Tariff is the maximum tariff level for a given commodity line that can be applied by a MFN. If the UK were to subject the EU to Bound Tariffs, it could see tariffs applied on Irish agri-food as high as 60% for products such as beef. WTO EU agricultural tariffs are outlined in Table2:

Table 2: WTO EU agricultural tariffs, 2014

Agricultural Product	Number of lines	Simple average (%)	Tariff range (%)	Standard deviation	Share of duty free lines (%)	Share of non-ad valorem tariffs (%)
Animals and products there of	351	20.2	0-288.9a	28.5	15.1	68.7
Dairy products	152	36.1	1-365.4b	59.6	0	98.7
Fruit, vegetables, and plants	503	13.1	1-635.4b	59.6	0	98.7
Coffee, tea, and cocoa and cocoa preparations	47	12.5	0-65.2	10.3	14.9	51.1
Cereals and preparations	230	15.7	0-75.8	12.0	8.7	80.0
Oils seeds, fats, oil and their products	174	6.4	0-117.1	12.7	35.6	6.9
Sugars and confectionary	44	25.7	0-119.7	29.9	4.5	88.6
Beverages, spirits and tobacco	303	13.6	0-116.2	17.8	18.2	55.8
Cotton	6	0	0	0	100.0	0
Other agricultural products, n.e.s.	259	5.2	0-85.8	10.3	51.0	22.0
Total WTO agricultural products	2,069	14.4	0-635.4	23.5	19.2	46.5

Source: WTO EU Trade Policy Review, 2015, Table 3.2

The likelihood of the UK applying such tariffs while it is a net food importer is quite slim. However, what is far more likely is a reduced MFN tariff being 'applied' to both the EU and other low cost countries. In this scenario Irish meat exporters in particular would face increased competition from countries such as Brazil and Argentina. This could reduce Ireland's market share in the UK while potentially driving down Irish beef prices. The worst case scenario for Ireland would be if the UK traded with the EU under the MFN rule but negotiated a free trade agreement with the aforementioned low cost countries or with countries such as Canada and the United States. UK farmers themselves would likely oppose such an arrangement as it would lead to significantly reduced prices paid for meat.

Should the UK leave the Custom's Union as well as the Single Market, the best probable scenario for the Irish agri-food sector would be if the UK were able to negotiate a free trade agreement with the EU that included agricultural trade. This view is shared by Professor Matthews, Trinity College Dublin who has stated:

'Given that both parties will want some formal trade relationship after Brexit this points to an FTA along Canadian or US lines as the most likely alternative. Assuming that such an FTA can be successfully concluded during the two years scheduled for the withdrawal negotiations, it might be possible to ensure full tariff liberalisation in the agricultural sector (given that the UK is such a minor exporter to the EU, the latter has no real defensive interests at stake and also the UK is unlikely to want to maintain high tariffs on EU imports). Given that the balance of Ireland's agri-food trade with the UK is strongly positive, retaining tariff-free trade with the UK is very much in our interest' (Matthews, 2015, pg.11).

NON-TARIFF BARRIERS TO TRADE

Even if an all encompassing FTA was agreed, trade costs would naturally increase as a result of non-tariff barriers to trade. Once the UK exits the single market non tariff barriers to trade will include custom controls, rules of origin checks, differences in regulations, (which inter alia may include food safety standards, treatment of animals, GMO's, pesticide residues, labelling changes) and anti-dumping duties. Non – tariff barriers would be particularly impactful for trade between Ireland and Northern Ireland. In assessing the impact of non-tariff barriers on the UK economy, the Centre for Economic Performance has estimated that the impending introduction of non-tariff barriers would lead to an overall fall of income per capita of between 1.28 to 2.61%. Taking Diageo as a practical example, their trucks make approximately 13,000 border crossings each year. A customs check could potentially delay each truck by between 30 minutes to one hour resulting in additional costs of approximately €100 per journey or €1.3m per annum[1].

Another difficulty Irish exports will have is exporting directly to continental Europe. Brexit could sever the current main shipment route to Europe which currently passes through Britain. This would impact negatively on transport and logistics costs.

[1] https://www.theguardian.com/world/2016/oct/20/guinness-may-be-good-for-you-but-borders-are-bad-says-ireland-drinks-chief

IRELAND AND NORTHERN IRELAND

an integrated sector

Of particular concern is the integrated nature of the agri-food sector between Ireland and Northern Ireland. Last year Ireland exported €690m worth of food and beverages to Northern Ireland, while importing €530m worth. However, these macro figures are only one aspect of the agri-food relationship between Ireland and Northern Ireland. Ireland and Northern Ireland have a highly integrated agri-food sector. A report carried out by the Centre for Cross Border Studies in 2015 offered a detailed analytical snapshot of cross-border activity focusing on the agri-food sector. The report focused on 68 small scale enterprises operating in four border counties: Armagh, Down, Louth and Monaghan. The report found that 3.2% of employees were defined as cross-border workers, while 36% of the businesses surveyed exported to the other jurisdiction-predominantly from North to South. On a broader scale many sub sectors within agri-food operate on a de facto all island market. Taking milk as an example where 594 million litres were imported from Northern Ireland for processing in Ireland. If import tariffs or even non-tariff barriers were put in place, this could decimate the Irish milk processing sector. In relation to wheat, much of the wheat that is grown in Ireland is sent to Northern Ireland for milling, and then re-imported back to Ireland. Due to benefits of economies of scale close to 40% of Northern Irish lamb is processed in Ireland, while a significant volume of Irish Pigs and Cattle are processed in Northern Ireland. In addition a number of food and beverage companies operate on an all island basis, with one aspect of the production cycle in Northern Ireland with another aspect in Ireland.

Prior to the referendum Northern Ireland's agri-food strategy recommended further cooperation across jurisdictions, including:

"Establish a single Agri-Food Marketing Organisation for Northern Ireland to consolidate all marketing and promotional activities for the industry with a clear food promotion strategy. This organisation must explore opportunities to work with Bord Bia and Scotland Food and Drink in areas of mutual interest and where joint programmes would enable access to EU funding streams" (p.14)

HOW TARIFFS MAY AFFECT CONSUMER BEHAVIOUR
in Ireland and the UK

Overall consumer behaviour will be impacted by the extent of the applied tariffs and level of elasticity associated with the corresponding goods and services. As adopted by the ESRI (2016) sector level elasticity estimates have been calculated by Imbs and Mejean (2016) and indicate a median elasticity for-6.1 of food products. Under the ESRI calculations the combination of the high level of elasticities associated with food and the application of the maximum WTO bound tariffs would result in food trade between the EU and the UK "close to being wiped out" (ESRI, 2016, pg.26).

It should be noted that this is an extreme scenario as the UK has a food trade deficit of approximately £26.8bn and, a Production to Supply Ratio (formerly known as the "Self-Sufficiency" Ratio) of 61%. The UK sources 29% of its food from the European Free Trade Area and only 10% from outside of Europe, Agriculture and Horticulture Development Board (AHDB, 2016). As a result it is doubtful that the UK would apply the maximum bound tariffs. Therefore, it can be concluded that although agri-food trade will be impacted and exports from the EU and Ireland will reduce, it is unlikely that it will be 'wiped out'.

What Agri-food products are most at risk?

All of Ireland's food sector exports would be affected by Brexit, including horticulture, meat, dairy, and consumer foods. In 2015 Ireland accounted for 60% of UK imports for beef and veal (by Tonnes), while the UK represented 50% of Irish beef exports.

In relation to dairy products, the UK represented 42.3% of Irish exports, including 65% of cheddar cheese exports and 54% of butter exports. Although Ireland only represents 5% of UK imports of lamb, the UK as a destination represents 23% of Irish lamb exports. Given that New Zealand and Australia account for 90% of UK lamb imports, increased competition from these countries could have severe consequences for Irish lamb exports.

It is likely that with any introduction of new trade barriers (tariff and non-tariff) between the UK, and the EU, the competitiveness of Irish food and drink may be eroded. Irish exports would diversify to alternate markets in either the EU or beyond, where in some cases they may receive reduced revenue in comparison to UK prices. Exporters to the UK as a result of increased competition from low cost countries, may be forced to reduce prices in order to maintain competitiveness..

POLICY RECOMMENDATIONS

Mitigating against the impact of Brexit for the Agri-Food Sector

The Chamber welcomes recent initiatives announced by the Government to support the sector notably the 'Agri Cash flow Support Loan Scheme', Income averaging 'step out' and the 'flat-rate VAT addition'. The Chamber also welcomes the increased funding for Bord Bia of €1.6m for additional support to the agri-food sector in the wake of the UK vote to leave the EU.

Further potential Government policy initiatives that could alleviate pressures faced by the agri-food sector include:

Expand Bord Bia's Marketing Intensification Programme

Bord Bia's Marketing Intensification Programme (MIP) was established following Brexit with a specific purpose to provide targeted marketing support to companies with high dependency on UK markets. Under the current programme the fund is approximately €660,000 and will support 32 companies. The current grant is targeted at Irish food and drink producers that operate with a turnover between €1m and €30m and that export at least 20% of their turnover to the UK. The Chamber is proposing that this programme's budget be increased to €2million with the criteria adjusted for turnover of €250,000 to €30m and that export at least 10% of their turnover to the UK. The Chamber proposes that this grant increase should be in addition to the existing Bord Bia budget. The Chamber would also propose that Bord Bia should receive increased funding to specifically promote the quality and sustainability of Irish Food and the Origin Green programme in the UK and in other key and emerging markets.

Seek EU Support

The recent de-valuation of Sterling has effectively wiped out the profit margin for many agri-food exporters. Article 219 of EU regulation allows for direct EU support to be given through CAP Market Support measures in order:

"To resolve specific problems, and on duly justified imperative grounds of urgency, relating to situations likely to cause a rapid deterioration of production and market conditions"

The Irish Government on behalf of the agri-food sector should seek direct EU support as a consequence of the impact of the referendum result on the sector.

Reduce Employer PRSI for affected sectors

The Government reduced the lower rate of PRSI as part of the 'Jobs Initiative' introduced in 2011. This scheme expired at the end of 2013. The Government should consider re-introducing this initiative.

POLICY RECOMMENDATIONS

Introduce a specific strategy to address the fallout from Brexit for integrated all-island agri-food businesses

The agri-food sector is the most integrated sector across both jurisdictions on the island of Ireland. It has effectively operated as one jurisdiction over the past ten years. Any tariffs or customs introduced post-Brexit will have a significant impact on numerous industries within the sector that operate on an all-island basis. The Chamber believes a specific strategy should be developed to address the fallout from Brexit for integrated cross-border businesses. The cost of reversing agri-food integration has yet to be fully examined, but such a study would be most beneficial for the sector, in determining the UK, Irish and Northern Irish Government's response.

Liaise with relevant experts in food safety and food security

Any lowering of standards or controls in UK food production post Brexit should be avoided. Efforts should be made to ensure that vigilance is increased regarding food safety and traceability.

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BACKGROUND

The British Irish Chamber of Commerce was founded in 2011 ahead of the historic visit of HM Queen Elizabeth II to Ireland and the subsequent State visit of President Michael D. Higgins to Britain. The objective of the Chamber is to champion the €60 billion annual trade between the UK and Ireland which directly sustains over 400,000 jobs. We are a bilateral Chamber, engaging members from across two islands and five legislative bodies in meaningful dialogue with a common purpose.

Excellent networking events help our members to find new suppliers and markets. Sector driven policy committees enable firms to jointly examine opportunities and threats and to think about collaborative growth in Europe and beyond.

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Andrew Yaxley	Tesco Ireland
Ailish Byrne	Ulster Bank

CONTACT:

Head of Sectoral Policy
Paul Lynam
T: +353 (1) 1 400 4323
M: + 353 (0) 86 0499252
E: paul.lynam@britishirishchamber.com

Head of Brexit Research & Support Services
Katie Daughen
T: +353 (0) 1 400 4324
M: +353(0) 86 865 1928
E: katie.daughen@britishirishchamber.com

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British Irish Chamber of Commerce, 3rd Floor, Newmount House
22-24 Lower Mount Street, Dublin 2

T: +353 (0) 1 400 4300 | E: info@britishirishchamber.com | W: britishirishchamber.com

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