



An Rialálaí Agraibhia  
Agri-Food Regulator

# Agri-Food Regulator Supplier Survey 2025

Published 20th May 2025





The mission of An Rialálaí Agraibhia (Agri-Food Regulator) (Regulator) is to act as an independent voice in the promotion of fairness and transparency in business-to-business relationships along the agri-food supply chain through, in particular, overseeing compliance with unfair trading law and proactive engagement with stakeholders on actions to improve transparency.

This survey, commissioned by the Regulator and conducted independently by Coyne Research, was undertaken as a means to explore the experiences of suppliers of agri-food products into the retail and wholesale sectors and thus, to inform the work and priorities of the Regulator.

It is an important element of our ongoing stakeholder engagement and initiated an annual process to facilitate those suppliers in informing the Regulator about their trading experiences with some of the largest buyers of agri-food products in the country.

I would like to thank the businesses – Aldi Ireland, BWG Foods, Lidl Ireland, Marks and Spencer Ireland, Musgrave Group and Tesco Ireland – who collaborated with the Regulator to distribute the survey to their agri-food suppliers. Their willingness to engage ensured that this survey gave a voice to their suppliers and the findings allow the Regulator to gain a greater insight of the current operating landscape – capturing both the positives and the challenges.

But, most importantly, I would like to express my sincere gratitude to the suppliers who took the time to complete the survey. I am acutely aware of how cautious a business might be about providing feedback about their experiences and, consequently, I appreciate the honest and frank assessments that were submitted.

These survey findings will guide the Regulator's work programme for the year ahead, and we intend to use the information provided to progress the development of guidelines for buyers and the conducting of further risk-based inspections with respect to compliance with unfair trading law.

Announcing the findings of this important survey at the Agri-Food Regulator Inaugural Conference, attended by a broad spectrum of the Regulator's stakeholders, was a great opportunity to consider, discuss and reflect on actions we can take to improve fairness and transparency in the agri-food supply chain.

**Niamh Lenehan**  
CEO, An Rialálaí Agraibhia





## Research Methodology

- The Agri-Food Regulator conducted this survey to gather feedback from suppliers of agricultural and food products on their experience of trading with specific buyers in the retail and wholesale sectors.
- The Agri-Food Regulator liaised with 8 businesses to send the survey to their supplier database.
- Each business received a unique survey link to distribute to their suppliers. There was also a general link on the Agri-Food Regulator website.
- Survey was live from 10<sup>th</sup> February – 9<sup>th</sup> March.
- 306 suppliers (sample size) completed the survey resulting in responses relating to 948 trading relationships.

| Business                 | Unique Link used for Survey Completions | Supplier Responses (trading relationships) |
|--------------------------|---|--|
| <b>Total</b>             | <b>306</b>                              | <b>948</b>                                 |
| Aldi                     | 30                                      | 103  |
| BWG                      | 63                                      | 147  |
| Dunnes                   | 0                                       | 131  |
| Lidl                     | 20                                      | 99   |
| M&S                      | 2                                       | 22   |
| Musgrave                 | 113                                     | 206  |
| Tesco                    | 47                                      | 136  |
| Sysco                    | 0                                       | 82   |
| Other Business           | -                                       | 22   |
| Agri-Food Regulator Link | 31                                      | -  |



# Understanding the Survey Findings

## Methodological Considerations

- The sampling methodology used was the best available within the limitations of the data available to the Agri-Food Regulator in order to try and maximise response rates.
- Although comprehensive, the survey was not designed as a randomised sample.
- As such, the approach in use effectively captures a view of supplier experiences across buyer businesses but has specific caveats.

## What This Means for Interpretation

- The findings provide valuable qualitative insights into the experiences of suppliers.
- Differences between businesses should be interpreted with caution.
- The survey findings represent the experiences of the responding suppliers and extrapolation to the whole supplier population may not be justified.



**Section #1**

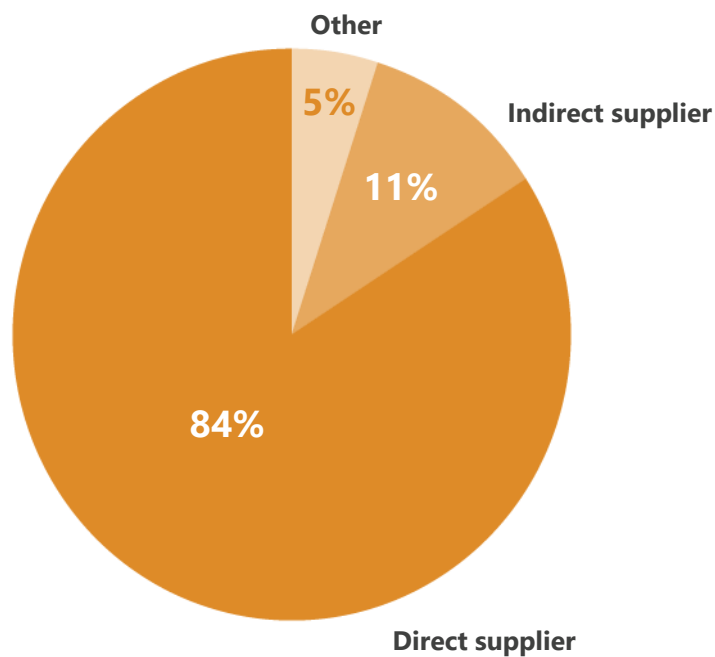
Profile of Sample



## Profile of Sample - I

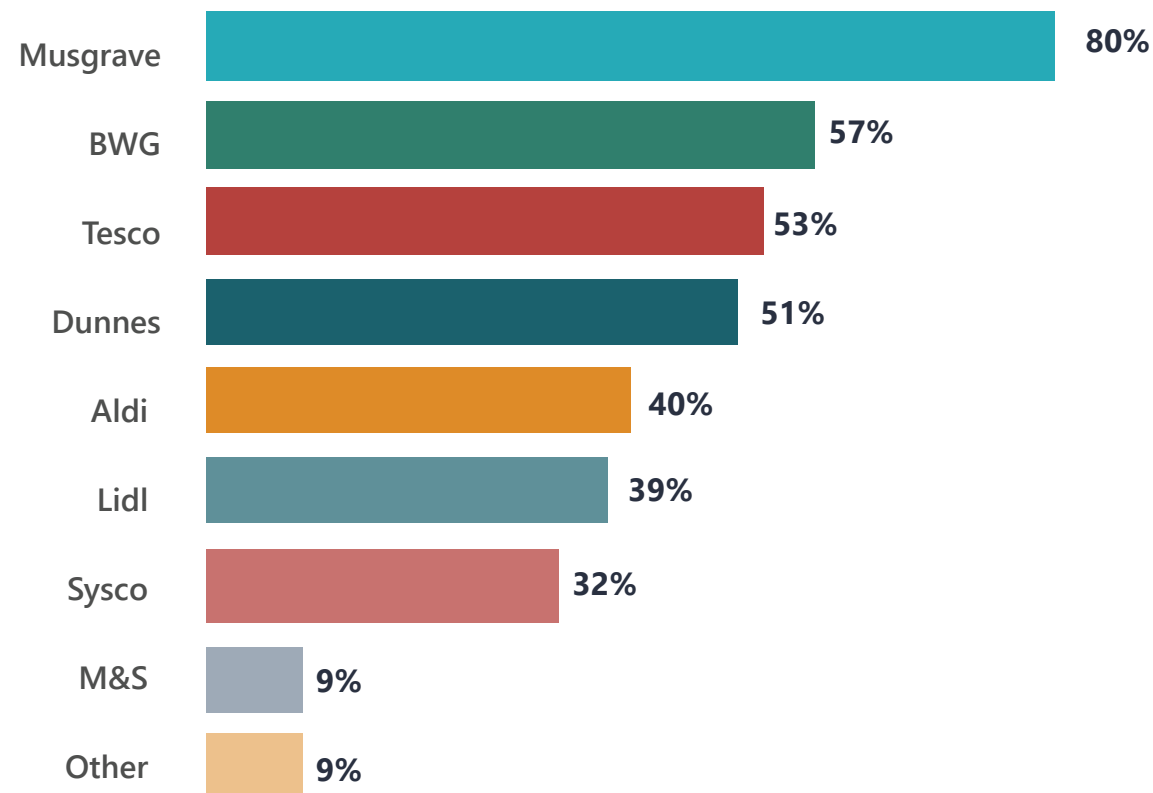
### Main Business Operations

Base: All suppliers of agricultural and food products - 306



### Retailers / Wholesalers Directly Supplied in 2024

Base: All direct suppliers of agricultural and food products - 256

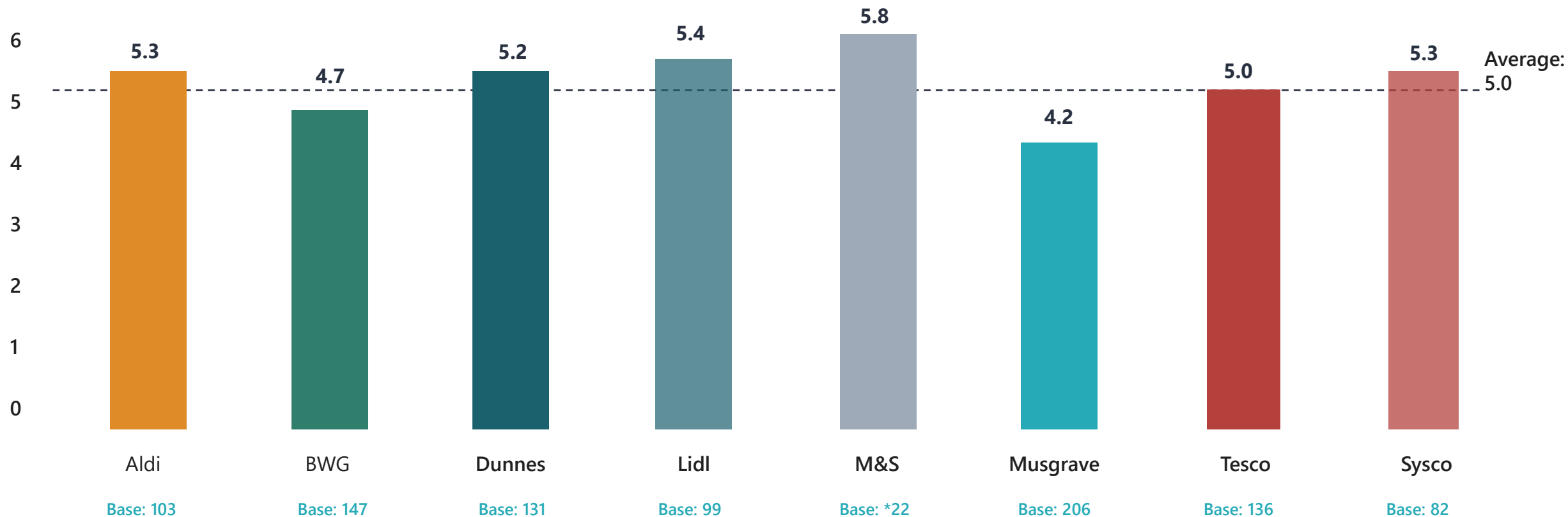


The vast majority of respondents were direct suppliers, while circa 1 in 10 identified as indirect suppliers.  
8 in 10 suppliers who completed the survey supply Musgrave directly.



## Average Number of Businesses Supplied

\*Caution Small Base Size



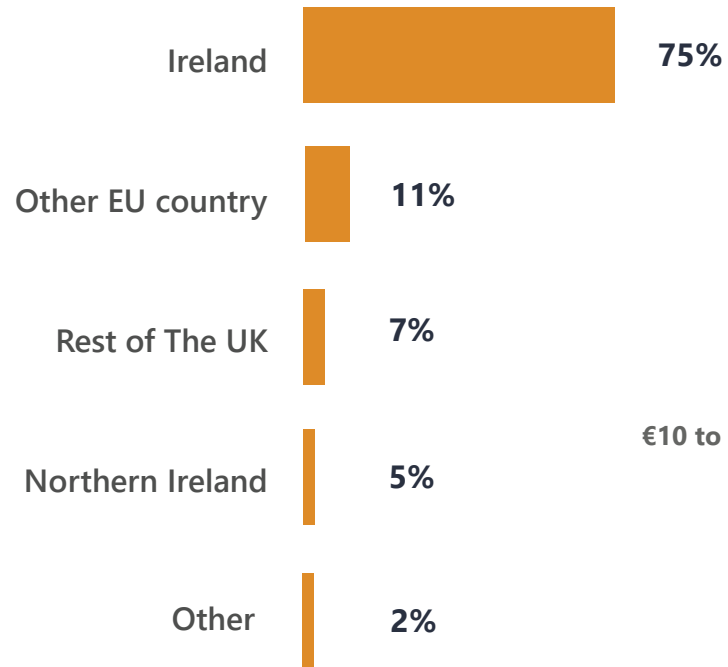
Direct suppliers supply an average of 5 businesses.



## Profile of Sample – II (Direct Suppliers)

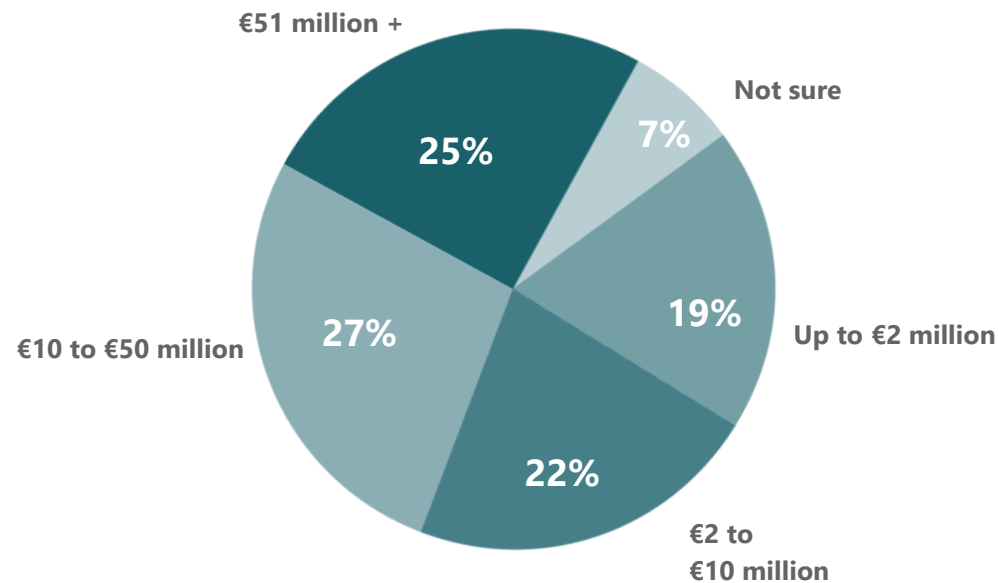
### Business Location

Total Base: 256



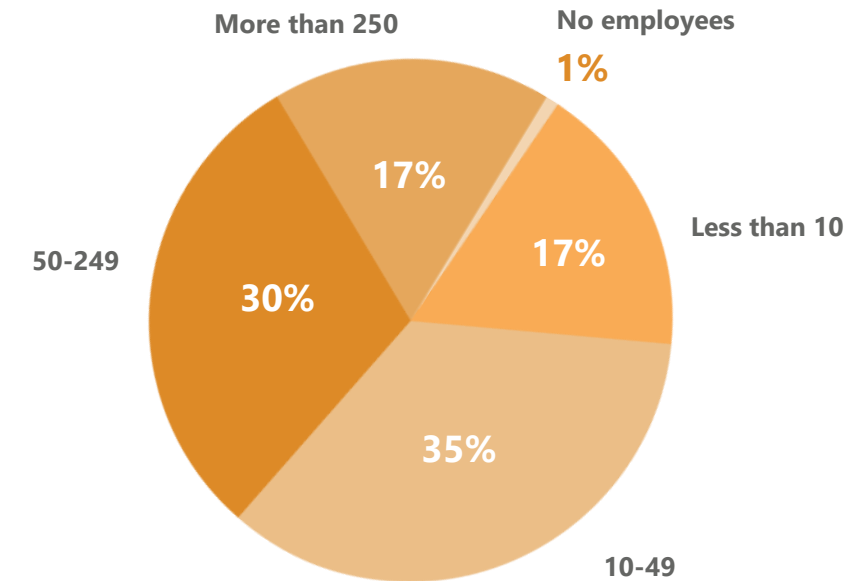
### Global Annual Turnover

Base: 256



### Number of Employees

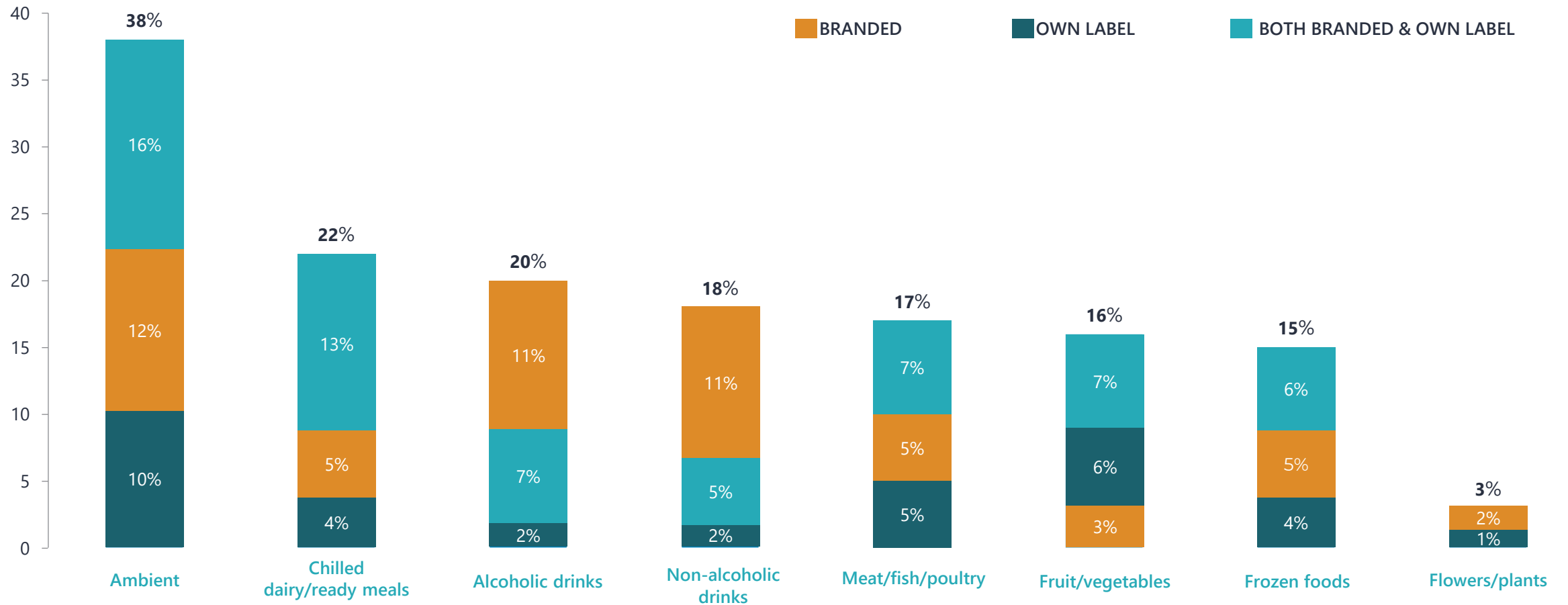
Base: 256



Over half of direct suppliers employ less than 50 people and 4 in 10 of the direct suppliers have a global annual turnover of up to €10 million. 3 in 4 are based in Ireland.



## Branded/Own Label Agricultural And Food Products Supplied



38% of direct suppliers supply ambient products. Drinks are most likely to be branded.

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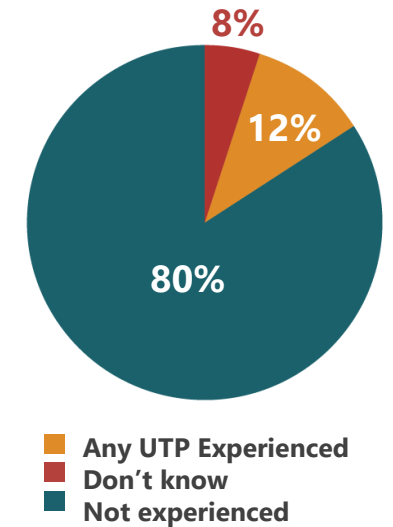
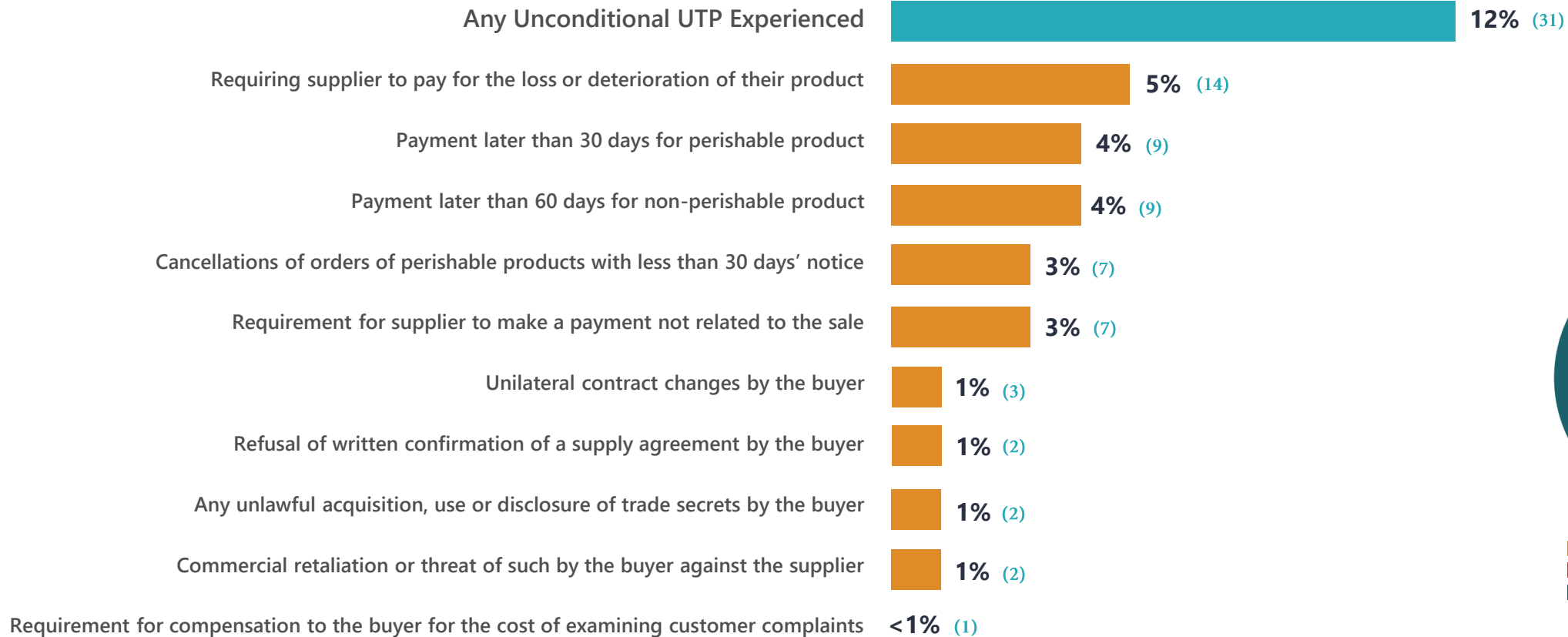
## Section #2

# Direct Supplier Experience with UTPs

# Unconditional UTPs Experienced with Buyers in 2024 - The Supplier View

These UTPs are prohibited in all circumstances

## Unconditional UTPs Experienced



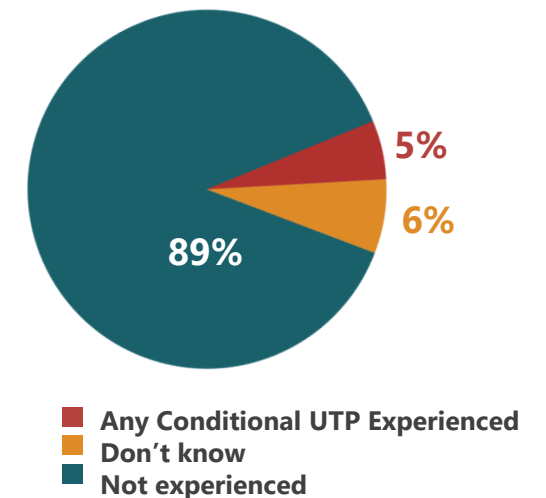
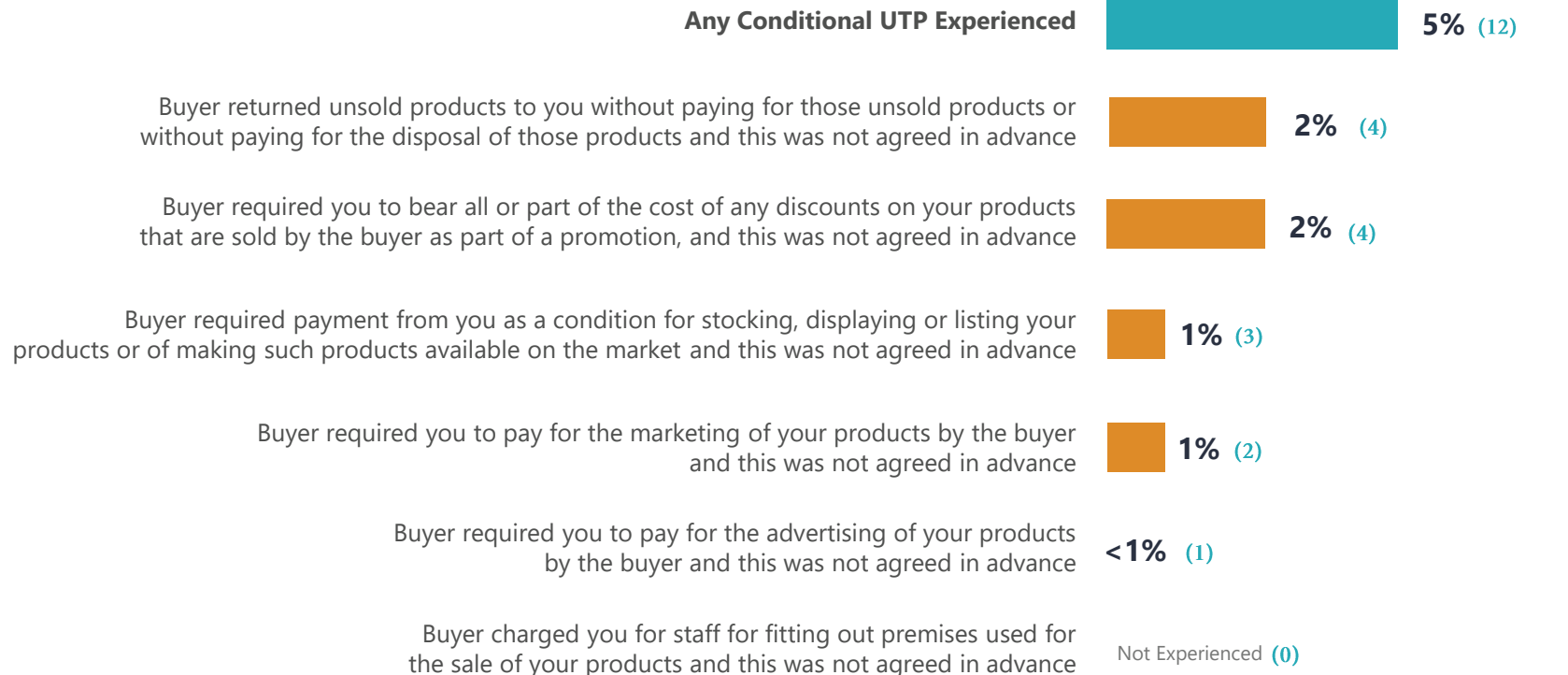
( ) = Actual Numbers

Circa 1 in 8 direct suppliers have reported experiencing any unconditional UTP. Some suppliers may have reported experiencing multiple UTPs with multiple buyers. Requiring a supplier to pay for the loss or deterioration of their product and payment delays are the top 3 mentions.



# Conditional UTPs Experienced with Buyers in 2024 – The Supplier View

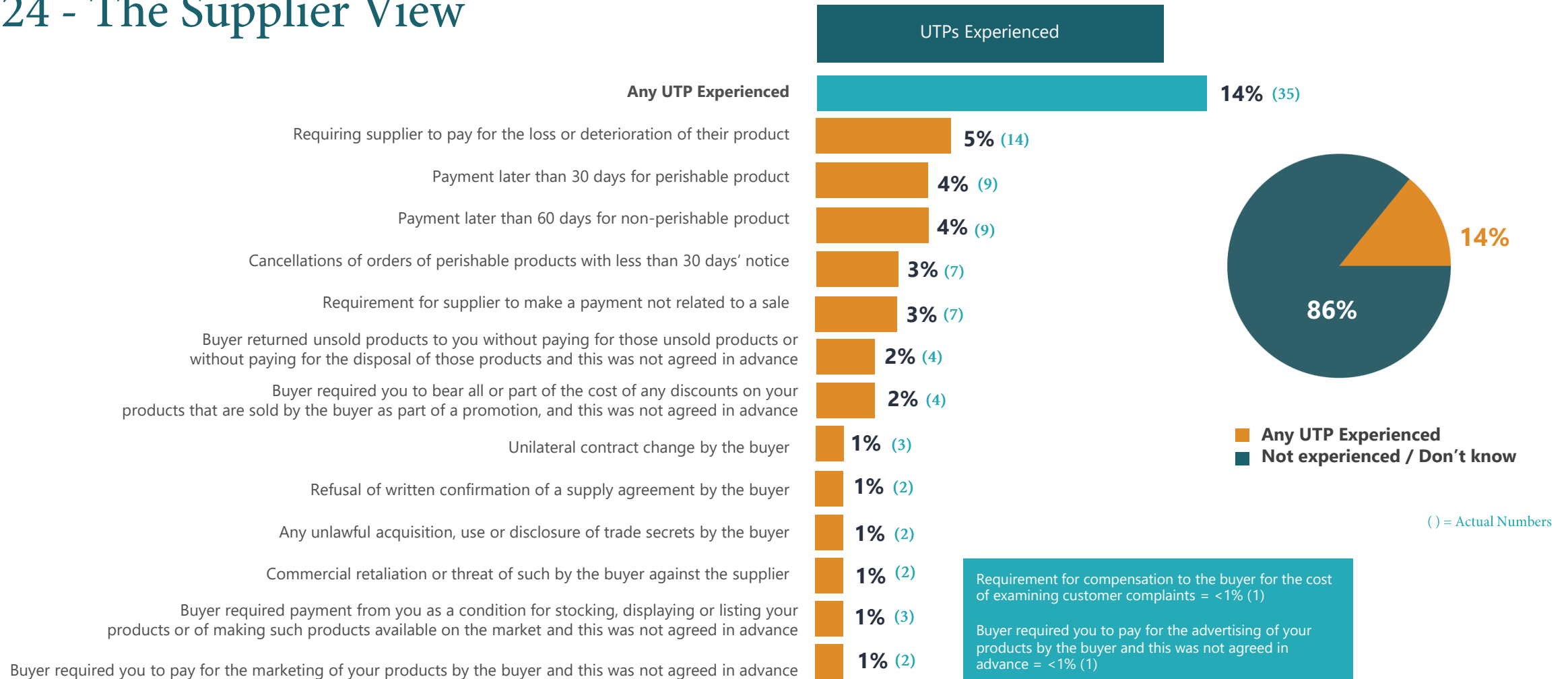
These UTPs are prohibited only if not agreed in advance



( ) = Actual Numbers

1 in 20 direct suppliers have reported experiencing any conditional UTP.  
Some suppliers may have reported experiencing multiple UTPs with multiple buyers.

# UTPs Experienced with Buyers in 2024 - The Supplier View

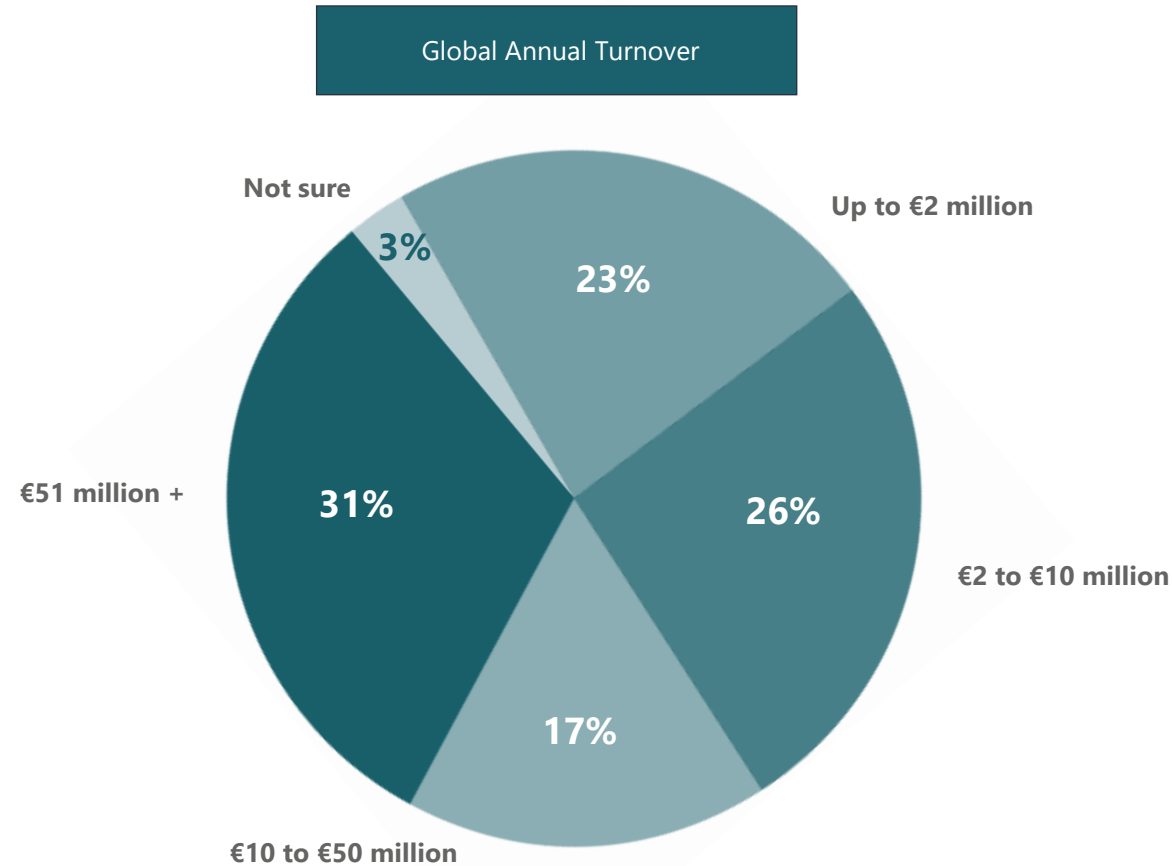


1 in 7 have reported experiencing a UTP in 2024. Some suppliers may have reported experiencing multiple UTPs with multiple buyers.



# Global Annual Turnover by UTP Experienced

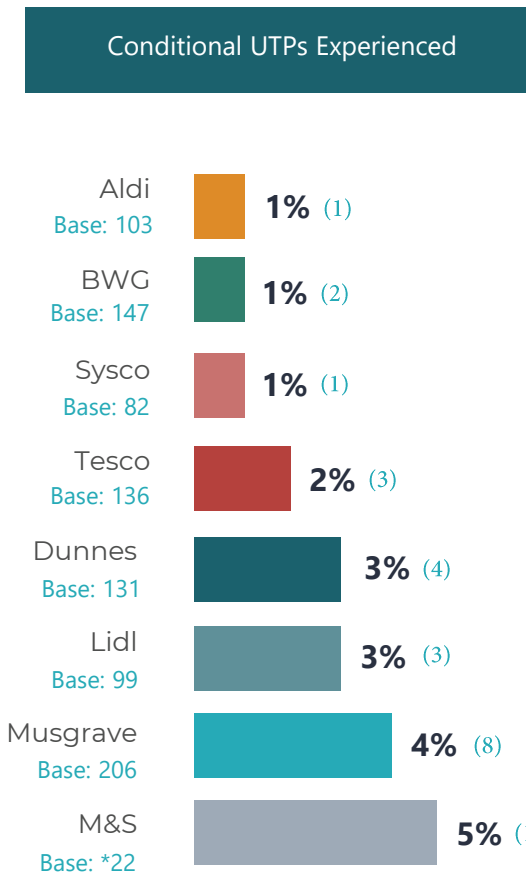
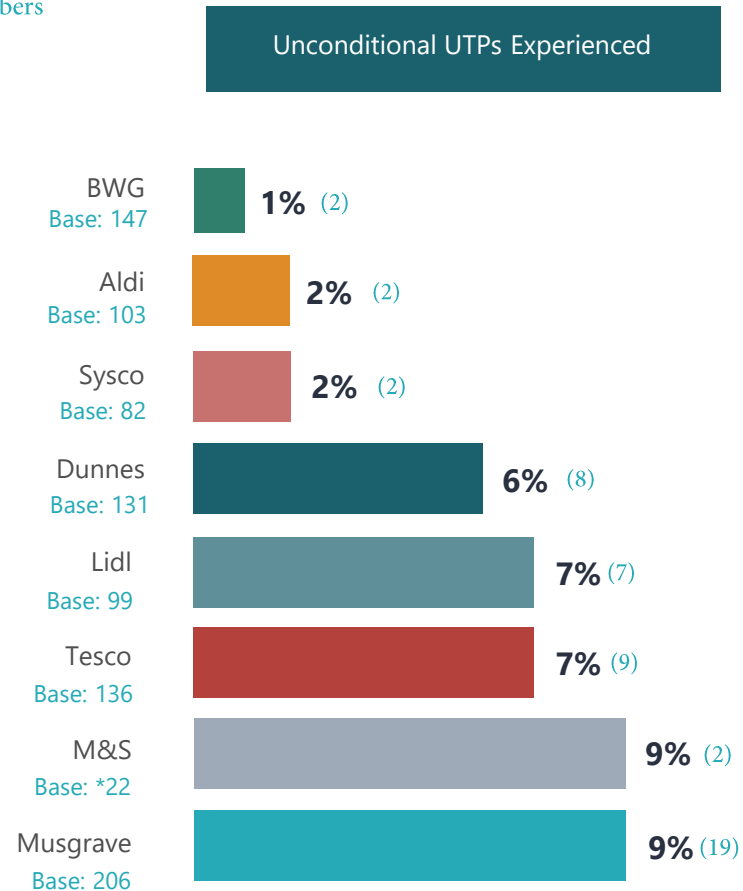
\*Caution Small Base Size



Amongst those who have reported experiencing a UTP in 2024, 5 in 10 claim an annual turnover of €10 million or less.

# UTPs Experienced with Buyers in 2024 By Business

\*Caution Small Base Size  
( ) = Actual Numbers

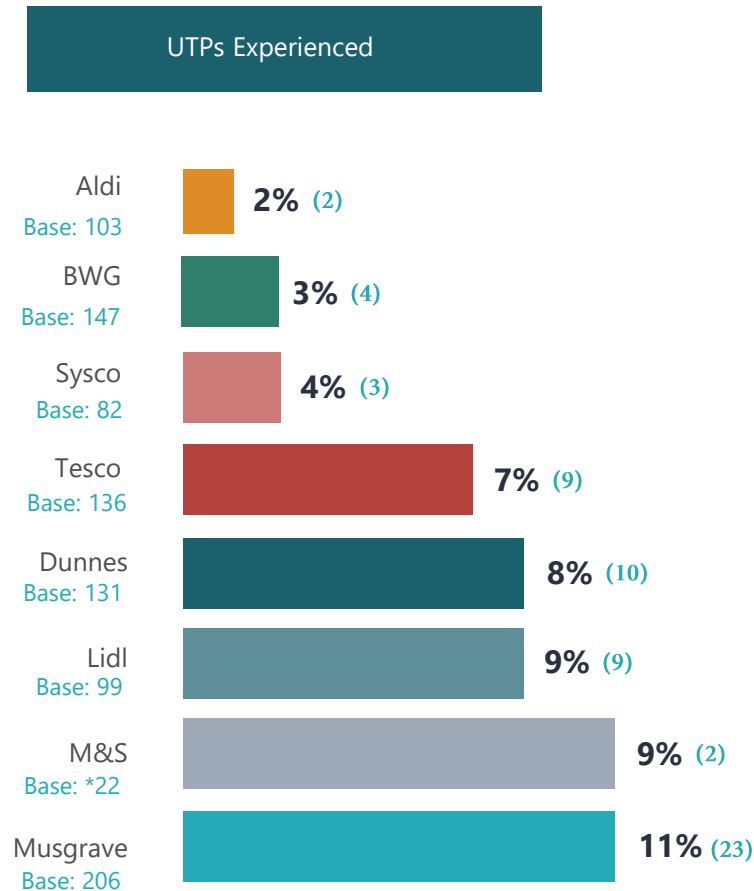


Almost 1 in 10 M&S and Musgrave suppliers have reported experiencing any unconditional UTP.  
Circa 1 in 20 M&S and Musgrave suppliers have reported experiencing any conditional UTP.



# Total UTPs Experienced with Buyers in 2024 by Business

\*Caution Small Base Size



14% (35) report  
experiencing a UTP

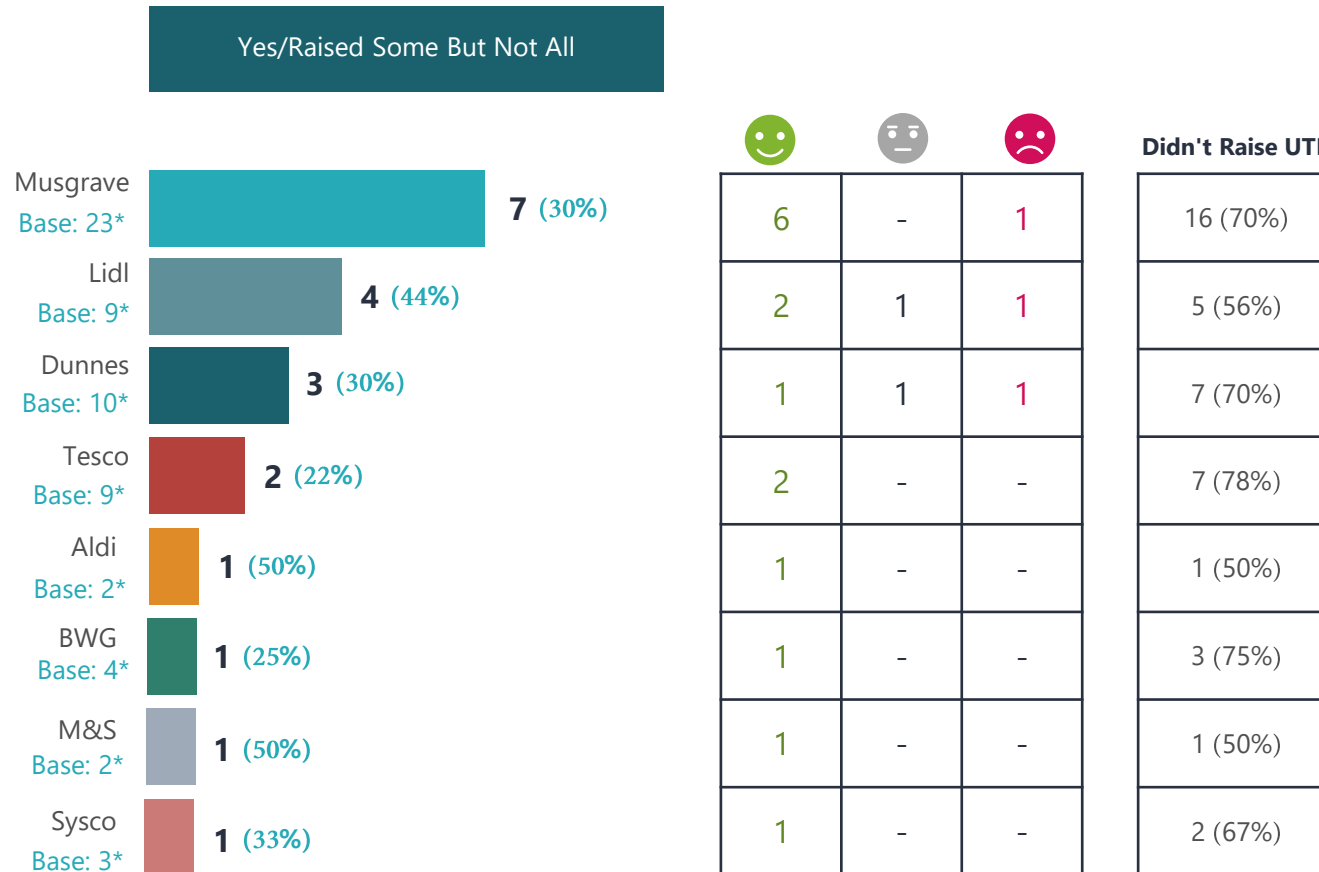
( ) = Actual Numbers

Circa 1 in 10 Lidl, M&S and Musgrave suppliers have reported experiencing any UTP in 2024. Some suppliers may have reported experiencing multiple UTPs with multiple buyers.



# UTPs Raised with Buyers in 2024 by Business

\*Caution Small Base Size



7 suppliers raised a UTP with Musgrave – 6 were satisfied with the outcome while one was dissatisfied.  
4 suppliers raised a UTP with Lidl – 2 were satisfied with the outcome while one was dissatisfied.



## Reason For Not Raising UTP with Buyers

*"I did not want to lose the contract."*

*"To maintain the longer-term  
relationship and business."*

*"**I did not know** that I can disagree with  
that. They told me that "All offers must  
be margin maintained" that means I  
had to amend my promotions prices like  
I had to bear all the cost of the  
promotions."*

*"To retain the longer-term  
relationships."*

*"Did not know. Thought it was  
common practice."*

*"To maintain long term  
relationship."*

*"It would jeopardize current  
and future business."*

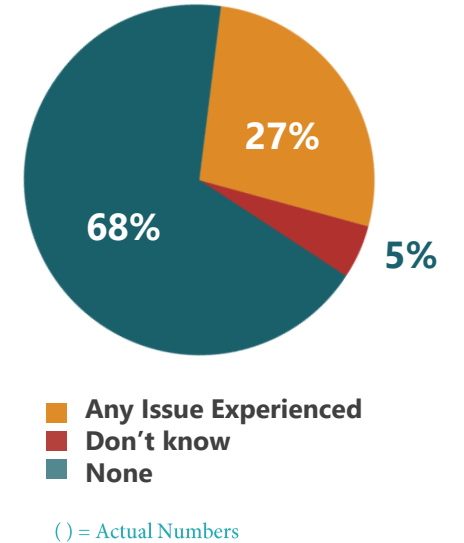
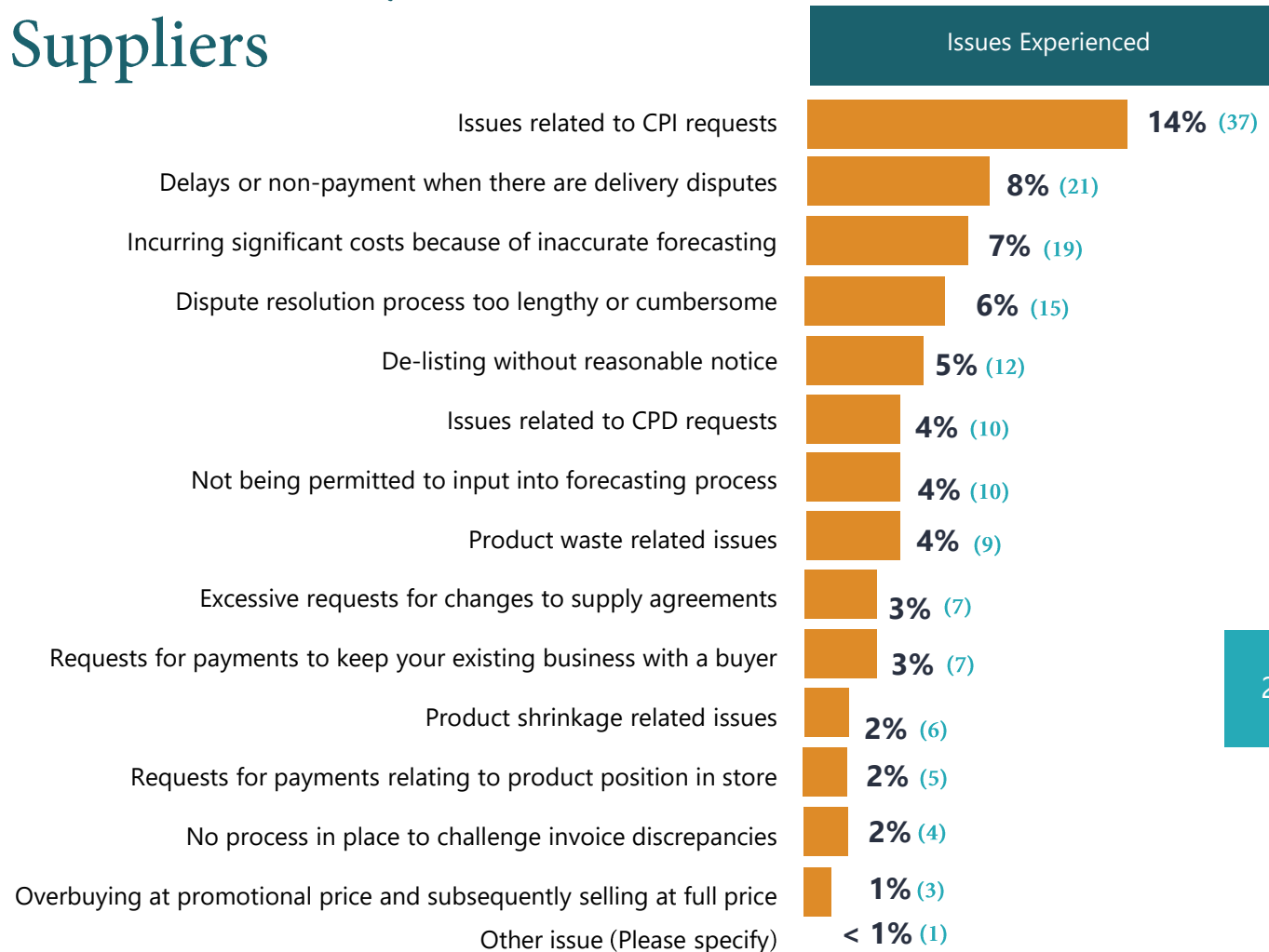
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Section #3

Direct Suppliers

Issues Experienced in 2024

## Issues Experienced with Buyers in 2024 – Direct Suppliers

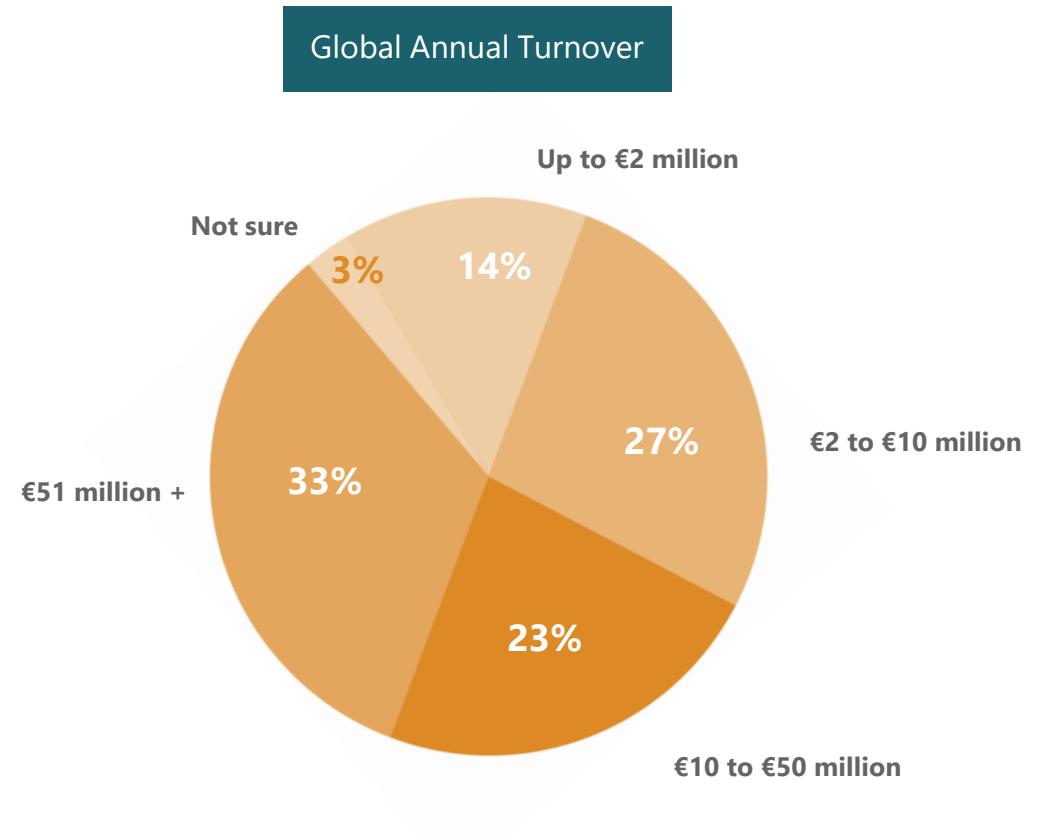


27% (69) have experienced an issue

1 in 7 direct suppliers report facing issues related to CPI requests. Circa 1 in 10 report having experienced delays or non-payment when there are delivery disputes or incurring significant costs because of inaccurate forecasting. Some suppliers may have reported experiencing multiple issues with multiple buyers.



## Global Annual Turnover by Issues Experienced

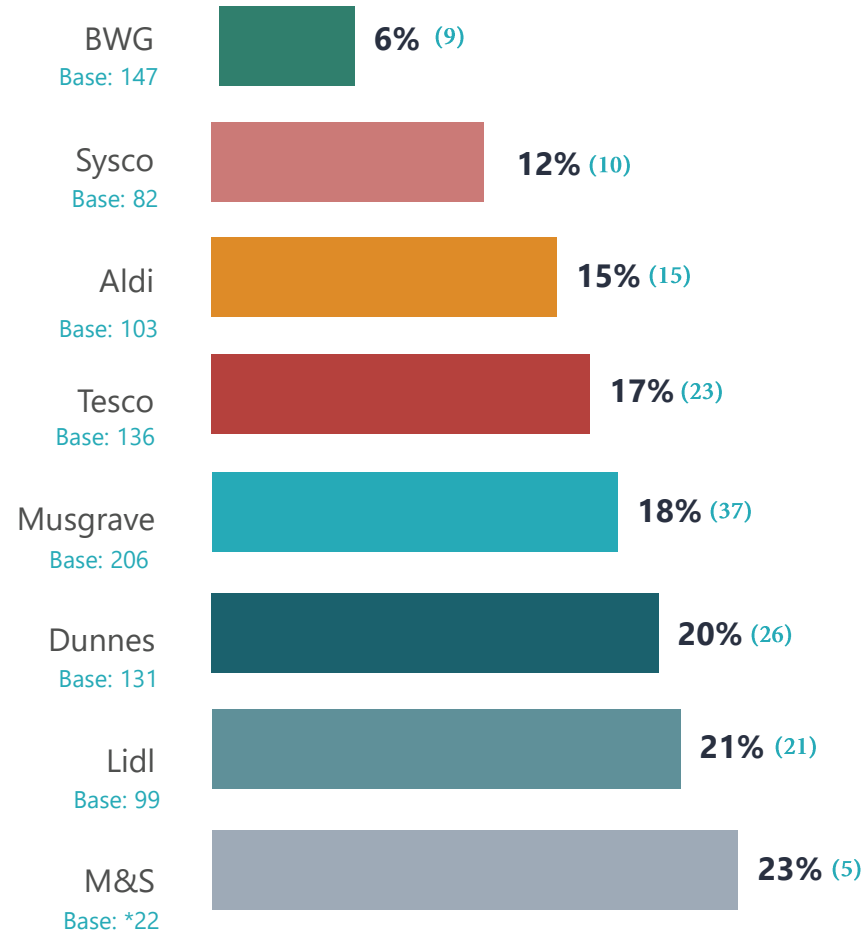


Amongst those who reported experiencing an issue in 2024, one third of them claim a global annual turnover of €51 million+.



# Any Issues Experienced with Buyers in 2024 by Business - The Supplier View

\*Caution Small Base Size



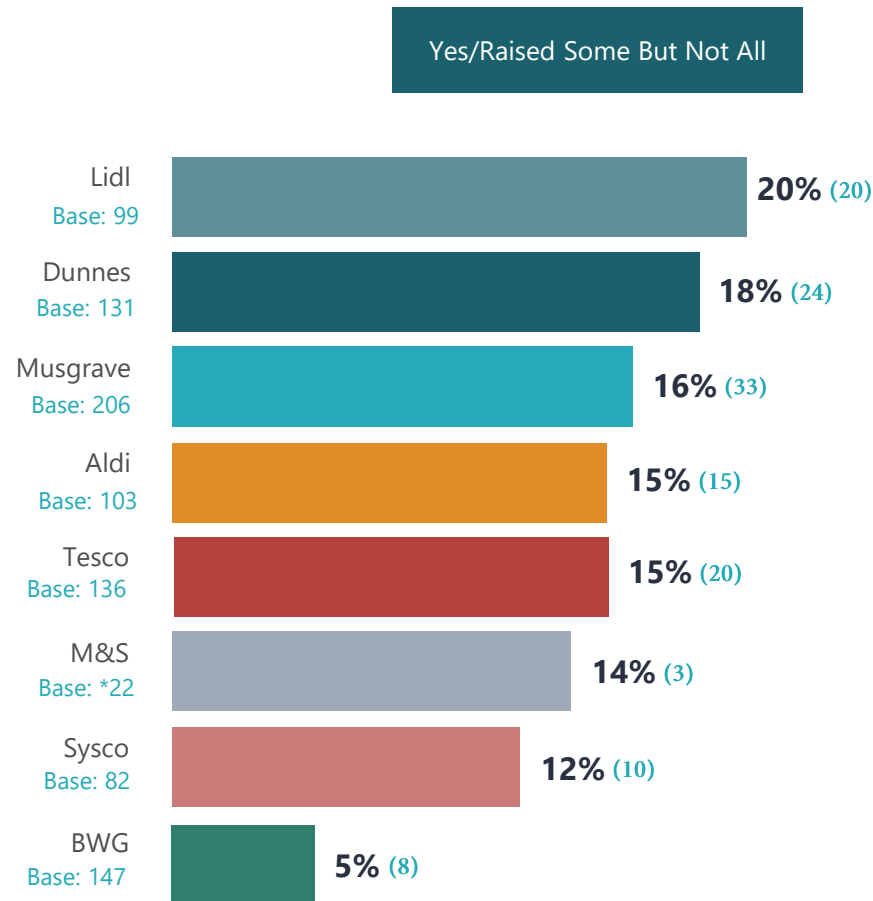
27% (69) have  
experienced an issue

1 in 5 Dunnes, Lidl and M&S suppliers report having experienced an issue in 2024  
Some suppliers may have reported experiencing multiple issues with multiple buyers.

( ) = Actual Numbers

# Whether Issues Were Raised with Buyers in 2024 by Business

\*Caution Small Base Size



( ) = Actual Numbers

Circa 1 in 5 Dunnes and Lidl suppliers raised the issues they experienced with their buyers.



## Reason For Not Raising Issues with Buyers

*"Fear of damaging relationship with Buyer, always a fear of delisting."*

*"Small percentage of total business."*

*"Difficult to raise these issues."*

*"Not sure who to talk to - requests to find out initially ignored. Took a while to resolve."*

*"New buyers. Previous buyer not accessible"*

*"Fear of damaging relationship with Buyer."*

*"The cost negotiation was part of a tender, although a tender it still had implications on our overall costs and any increases we have occurred when procuring any raw materials."*

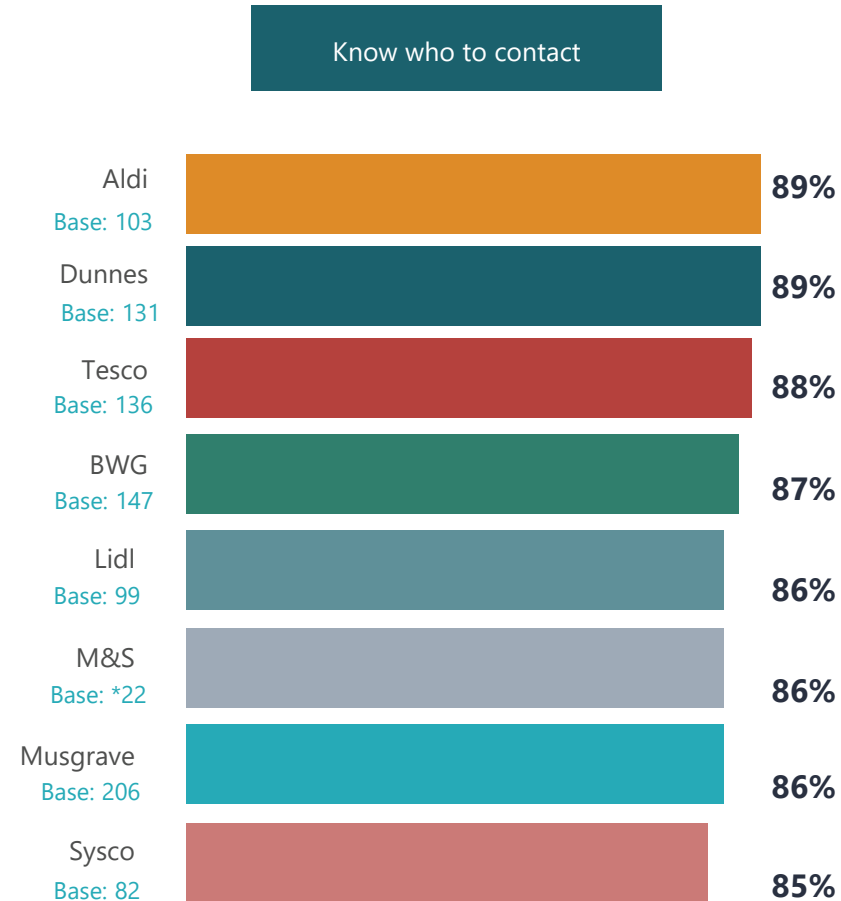
*"No relationship with Buyer."*

*"New buyer"*



# Incidence of Knowing Correct Contact to Raise Issues Within The Buyer Business

\*Caution Small Base Size



High incidence of knowing correct contact to raise issues within the buyer's organisation across all businesses.

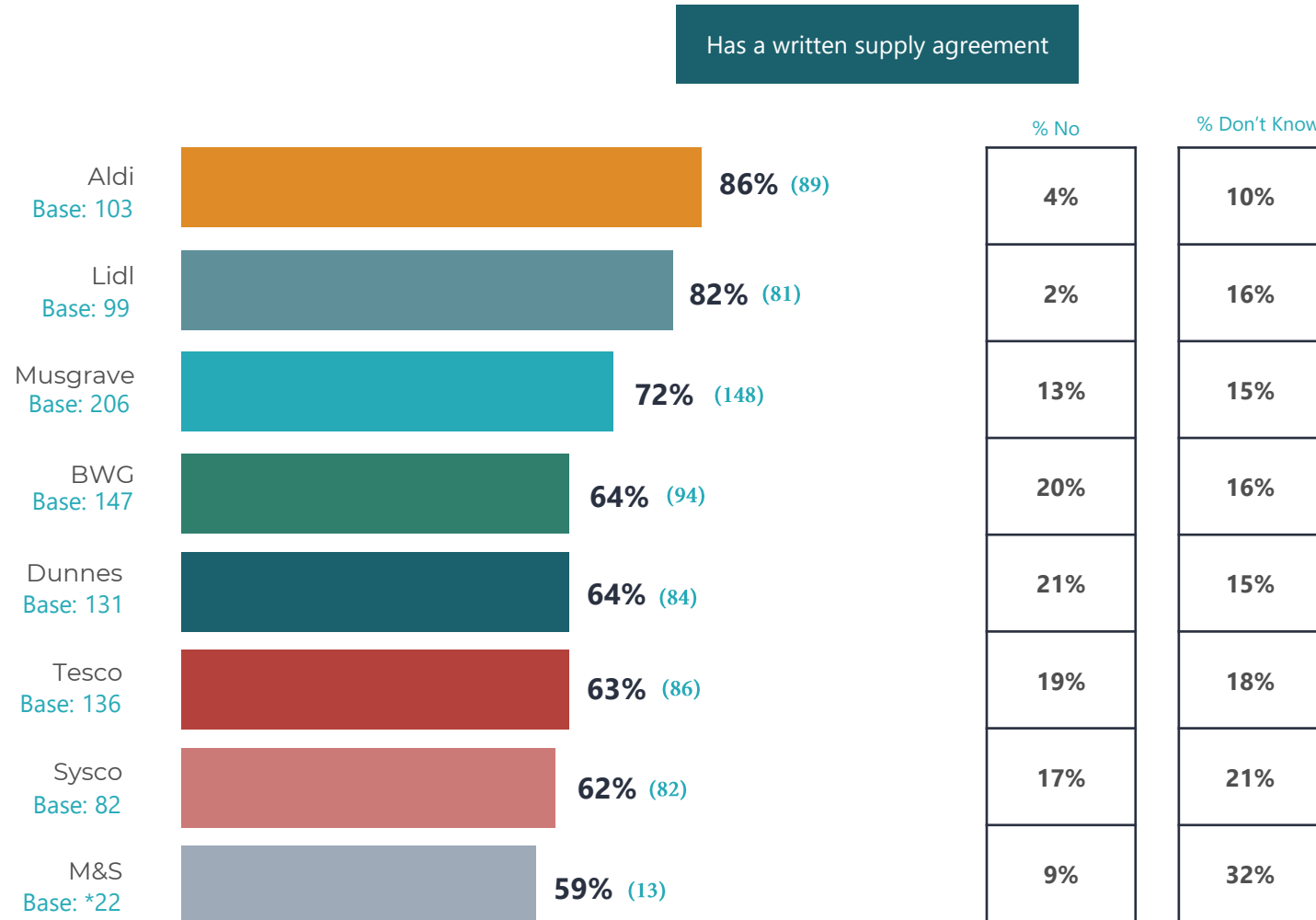
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## Section #4

# Direct Suppliers Relationship with Buyers

# Whether Written Supply Agreement with Buyers?

\*Caution Small Base Size

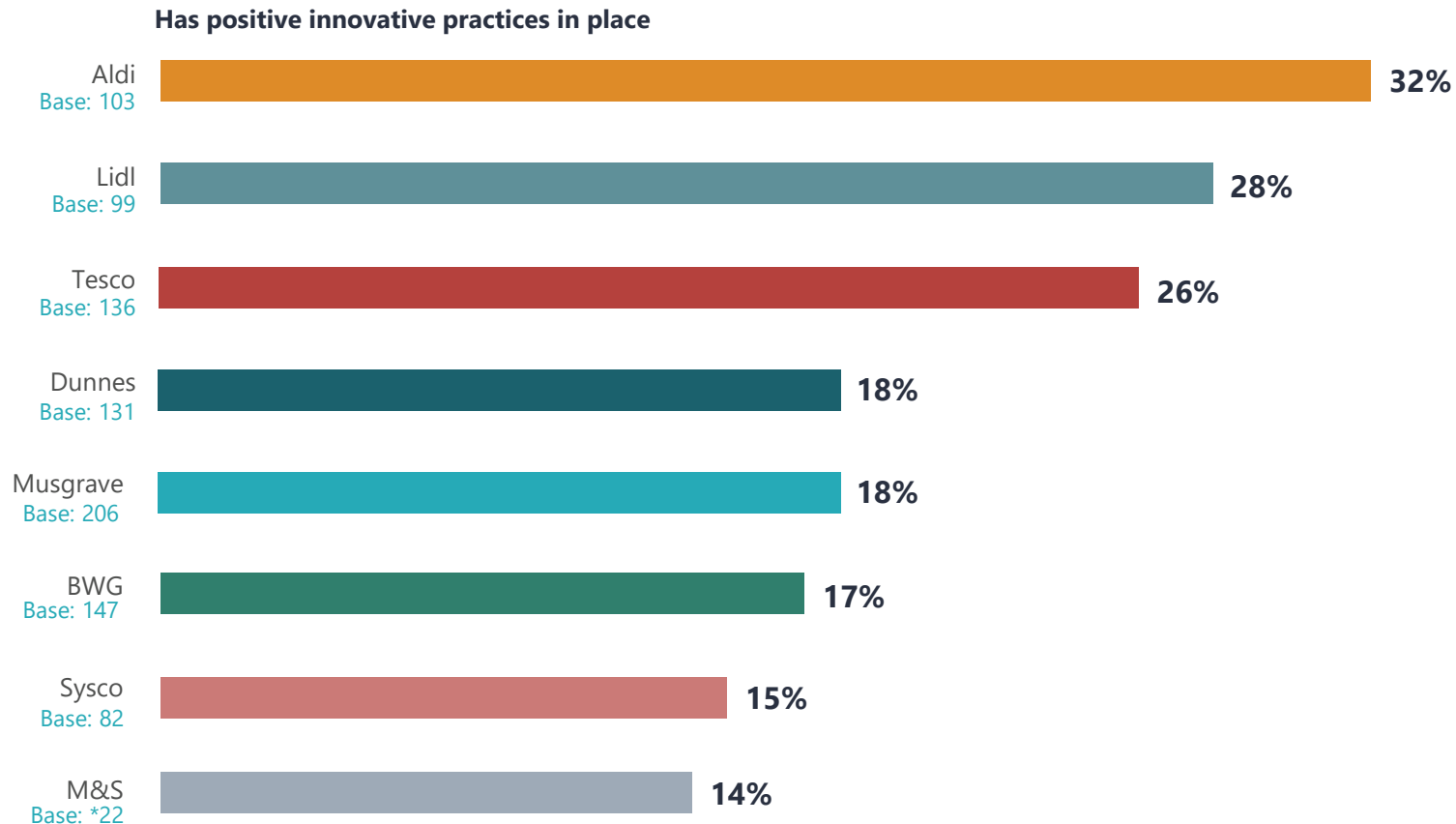


( ) = Actual Numbers

Aldi suppliers report the highest incidence of written supply agreements at 86%, followed by Lidl (82%) and Musgrave (72%).

# Innovative Buyer Practice(s) With Positive Impact on Trading Relationship – The Supplier View

\*Caution Small Base Size



1 in 3 Aldi suppliers claim that Aldi has innovative practices in place that have a positive impact on their trading relationship.



## Innovative Practices Buyers Have in Place That Have Positive Impact on Trading Relationship - II

*"Flexibility on specifications in order to meet seasonal challenges due to weather. Promotional flexibility in terms of timings."*

*"Forecasting orders much better - good communication."*

*"New SKU's introduced due to gaps in the market."*

*"Forecasting orders and working with a productive and efficient team who are very easy to get hold of."*

*"Are sharing forecasts that allow better planning together."*

*"Engagement on CSR and Environmental issues with our CSR team to strengthen our trading relationship."*

*"Conferences that share relevant information around plans and strategy."*

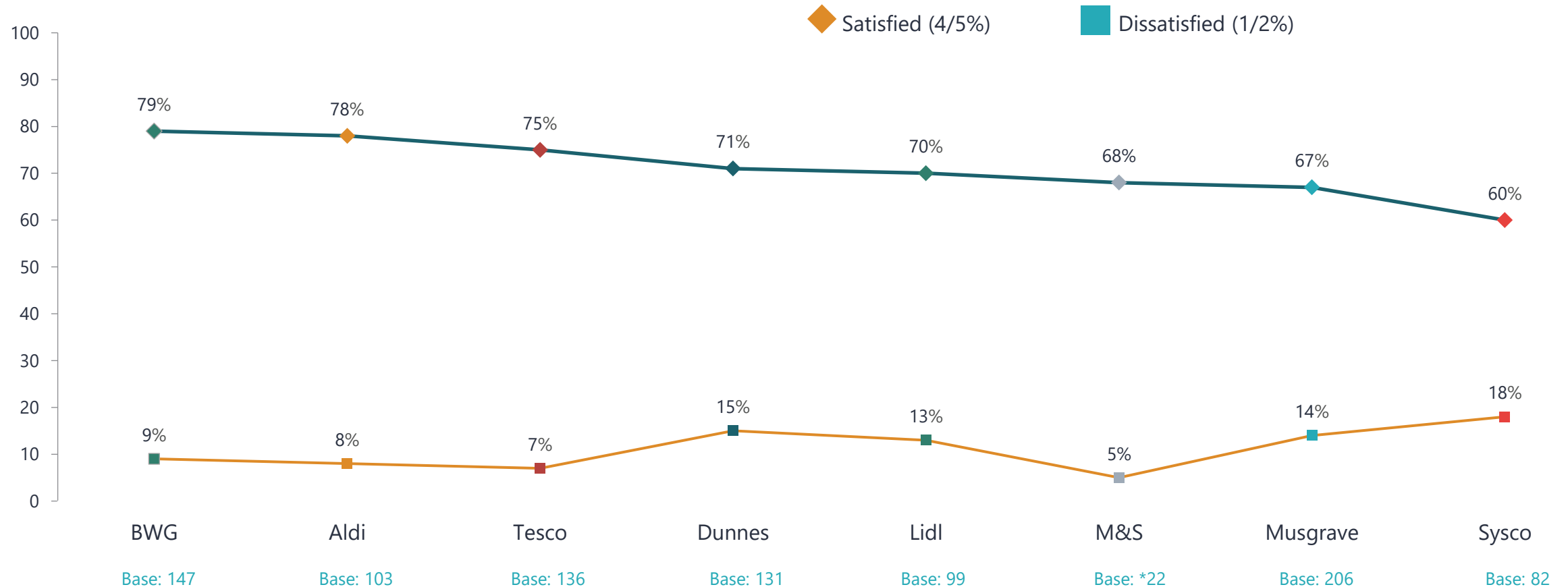
*"New approval process which seems faster."*

*"This is a very new customer for us and they are working very closely with us enhancing the range we supply through product and packaging development."*

*"Open NPD days outside of briefs, enabling us to bring concepts to them."*

# Overall Satisfaction with How Buyers Conduct Their Business

\*Caution Small Base Size



Highest level of satisfaction with how buyers conduct their business amongst BWG, Aldi and Tesco suppliers.



## Reason for Being Satisfied with How Buyer Conducts Their Business

*"Always promote small artisan producers in bringing new products to market, always will work with you to drive my business with them."*

*"Good open communication model where both sides have clear understanding of what expected and direction to go in."*

*"Very open and engaging. Committed to a one business solution and open on their KPI's so we can deliver on these."*

*"They are clear, they make quick decisions, and our working ethos is closely aligned."*

*"Communication is good and resolution is generally quick."*

*"Excellent Buyer that is always available. The best in Ireland."*

*"They are transparent and collaborative."*

*"Buyers are knowledgeable, what they agree to do they do so you can trust in investment."*

*"Very professional to deal with. Their customer portal is excellent."*



## Reason for Being Dissatisfied with How Buyer Conducts Their Business

*"Hard to get long term commitments. CPI discussions can take an excessive amount of time suppliers left in limbo to carry costs until they wish to discuss. Often ask for reductions or increases in LTA because their costs base has gone up but expected supplier to maintain same costs year over year."*

*"Biggest issue is short term contract with pressure on price always the primary concern of buyer."*

*"Expectation to invest more year and year without changing results at their end."*

*"Hard to get face to face contact with buyer."*

*"They can be extremely slow to act on an issue or request."*

*"Most contracts are only for 6-month periods, but they are not agreed in timely manner. Renewals on contracts can happen only a few weeks before they are due to go live. They are rarely agreed at the time land must be rented or seed purchased. Pricing can be submitted by supplier on time, but you may not hear back for 2 to 3 months after which some product may be planted without knowing if you have the contract or not. Most produce require 2-to-3-years planning for crop rotation and investment in machinery but can't get more than 6-month commitment on most lines."*

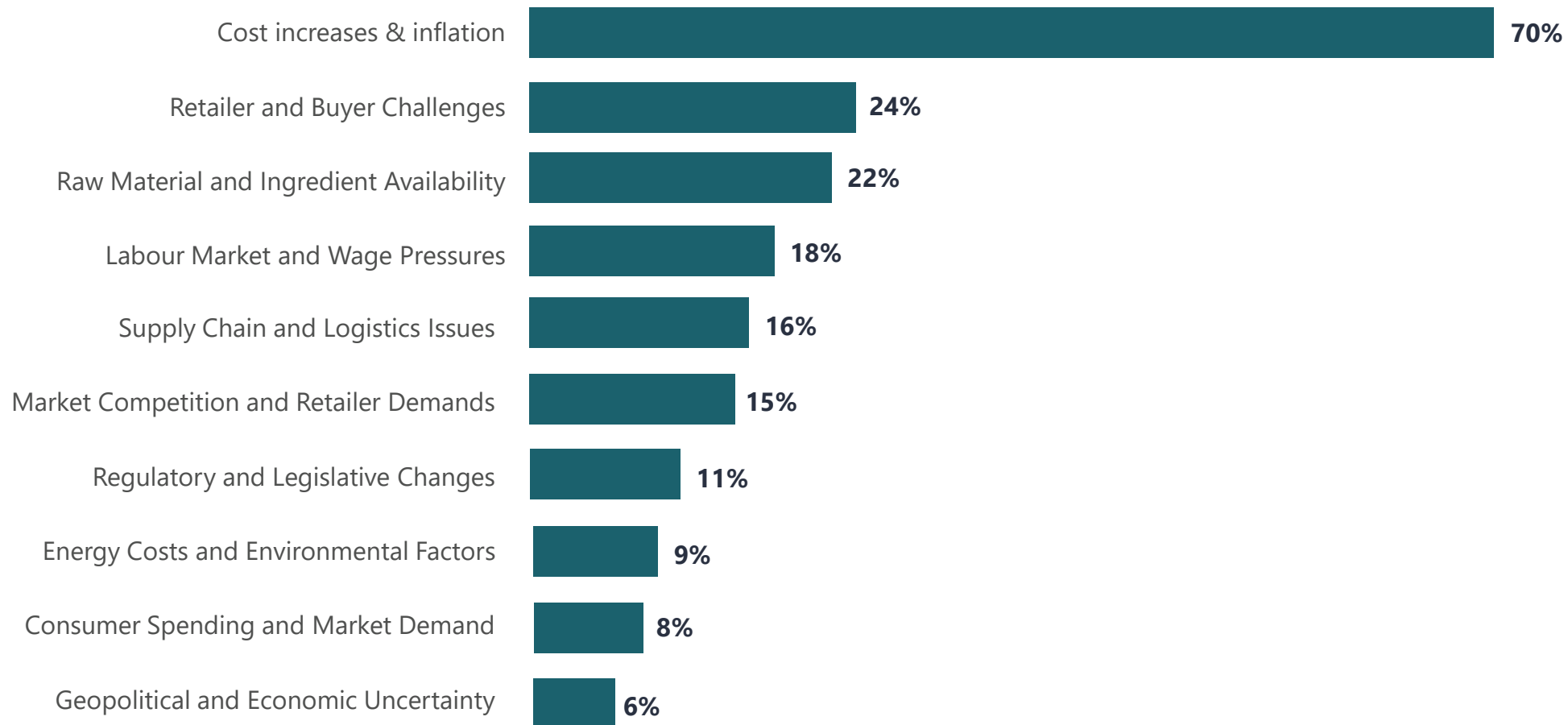
*"Some issues can be passed to many different departments and therefore take a long time to resolve."*

*"Constant expectation to lower price despite not seeing it pull through for the end user. Not much contact."*

*"Very difficult to work with cannot get response from buyers unless they are looking for something usually a charge of some sort."*

*"Lack of communication in terms of planning and forecasting in particular for new products."*

# Main Issues Facing Suppliers in the Year Ahead – The Supplier View





## Main Issues Facing Suppliers in the Year Ahead

*"Lack of long term or any commitment from retailers. Impossible to invest in innovation and growth if you do not know if you will be supplying a product in 6 months time. CPI increases - continuous increases in minimum wage put enormous pressure on the costs of production. Most fresh produce is very labor intensive but increases in min wage are never seen as justification for CPI increases with retailers. Supplier are left to absorb the costs of these."*

*"Increase in minimum wage requiring further price increases."*

*"Farm gate prices will not rise in response to the raises in minimum wage. Labour is becoming unsustainable. Buyers putting growers against each other."*

*"Cost of doing business and recovering same from the market."*

*"Increasing costs supply of labour possible disruption to supply of ingredients energy costs sustainability requirements."*

*"Product Availability and supply issues."*

*"Unrealistic expectations of price reductions."*

*"Costs are continuing to rise and we are struggling to keep pace with these cost increases."*

*"Extreme price variability and subsequent profit, or lack of it."*

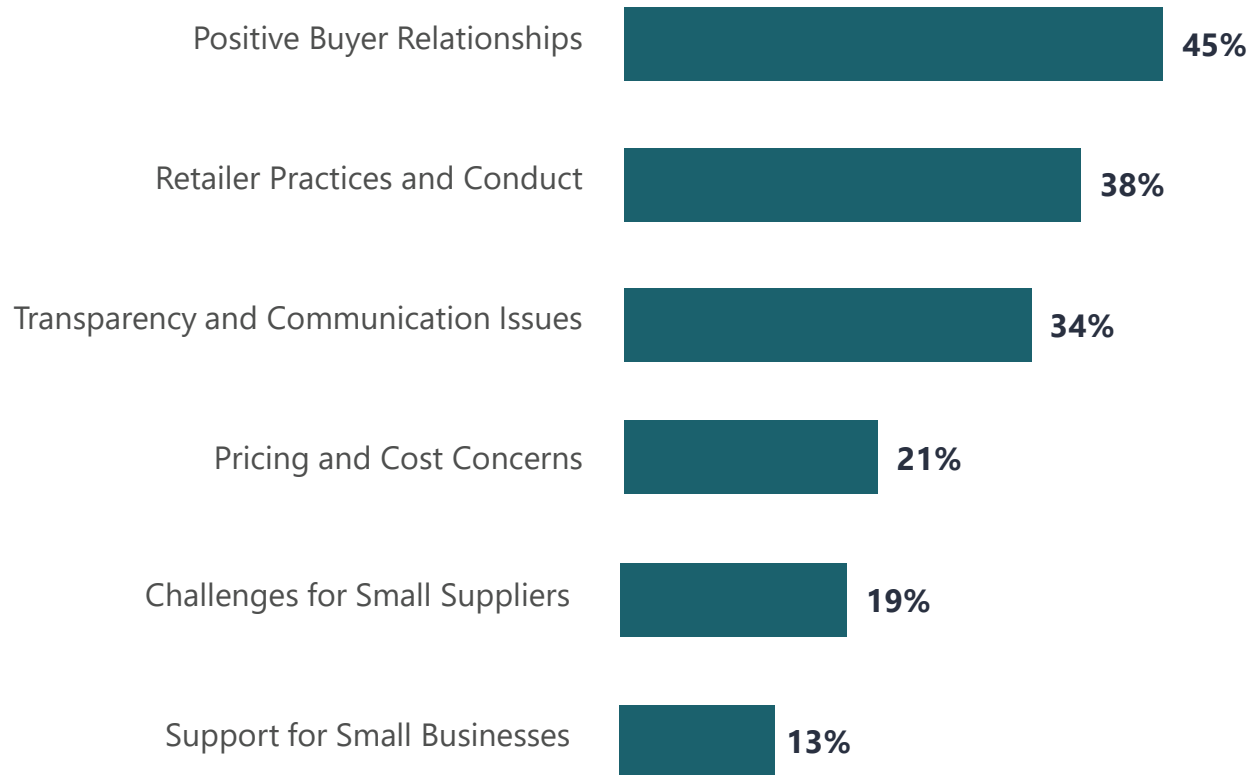
*"Maintaining profitability amid input cost increases and cost of doing business."*

*"Crop related issues and threats due to adverse weather conditions."*

*"CPIs being rejected with inflationary pressures and shipping costs increasing."*

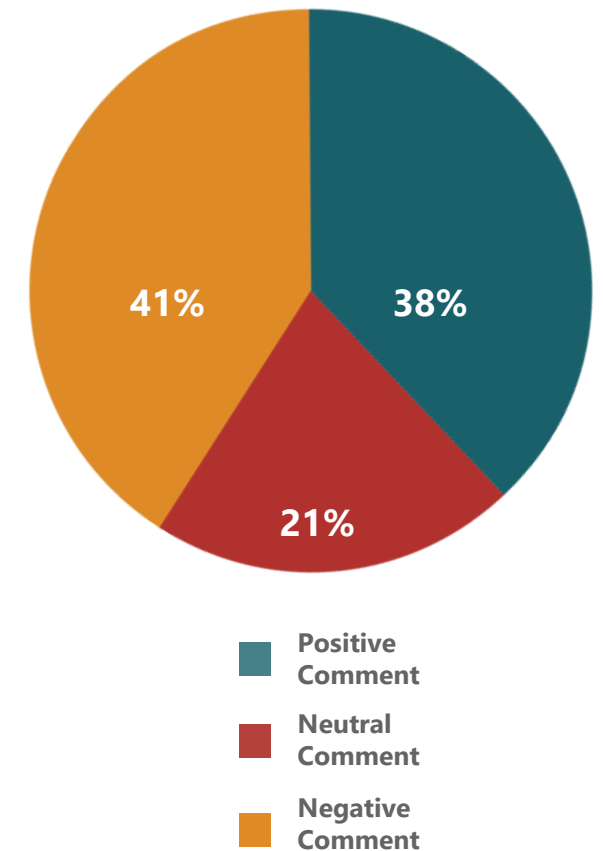


## General Comments About Buyers by Subject – The Supplier View



## Agri-Food Regulator Supplier Survey 2025

Base: All suppliers who provided  
an answer - 53  
Q.25





## General Comments About Buyers

*"For the independent stores our experience is mostly great. So too of the larger retailers but we do find when they turn over their staff, we lose that relationship with those on the floor, which can lead to issues relating to shelf space, letting us know when to re-stock, what will work well etc....Overall though, our experiences are good."*

*"In general Irish buyers are amongst the most open, reliable, communicative and friendly compared to many other export markets. It is always a pleasure to deal with Irish companies."*

*"My Buyer has always tried to work with me when it come to my brand, especially with it being new to the market and trying to give it ever chance."*

*"Cost Price increases: There is too much discussion by each retailer with a supplier trying to negotiate cost price increases about the future retail price of a suppliers products in competing retail outlets during negotiations on a cost price increase. We did not negotiate a cost price increase in 2024. However, the standard approach is that the retailer will not give the agreed cost price increase to us [supplier] until another retailer moves /increases the retail price. This means the supplier has to find a "helpful" retailer to move the retail price first. This usually means a financial inducement and a lot of discussion about retail price. Bigger, typically multinational suppliers, will not discuss retail prices and will tell the retailer that supply of product cannot be guaranteed after a certain date. Smaller suppliers do not have the leverage to do this."*

*"Some higher rates of LTA percentages make Local suppliers products more expensive compared to stores own Brand products."*

*"Overall, buyers are professional and receptive. Tension arises when cost price increases are introduced. These cpi's can be due to volatile markets that wipe out any supplier margin. The main concern is the length of time taken to have cpi's approved and implemented. We give 30 days notice - after much deliberation - yet implementation could take up to 90 days longer. In some cases, buyers request 12 weeks notice and some flatly refuse. Much of this is tactical but it has a negative effect on a suppliers cash-flow, etc. Ironically, if there is a cost price decrease, the retailer expects it immediately!"*

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Section #7

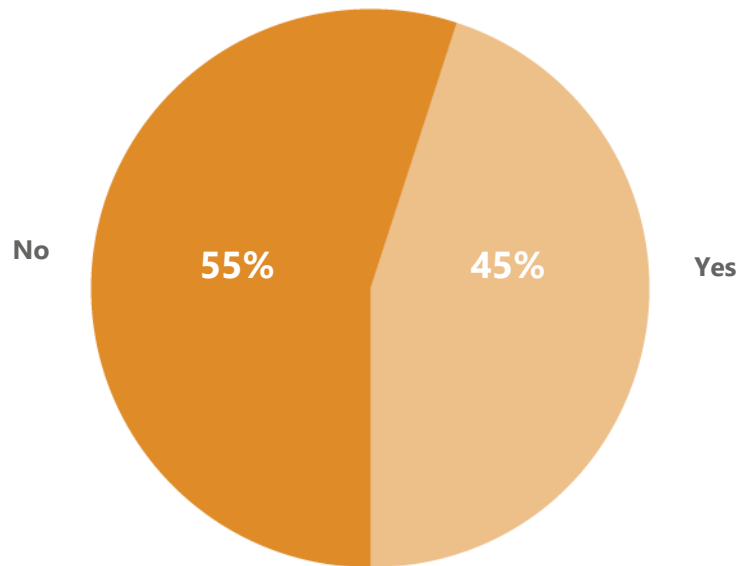
# Agri-Food Regulator Information



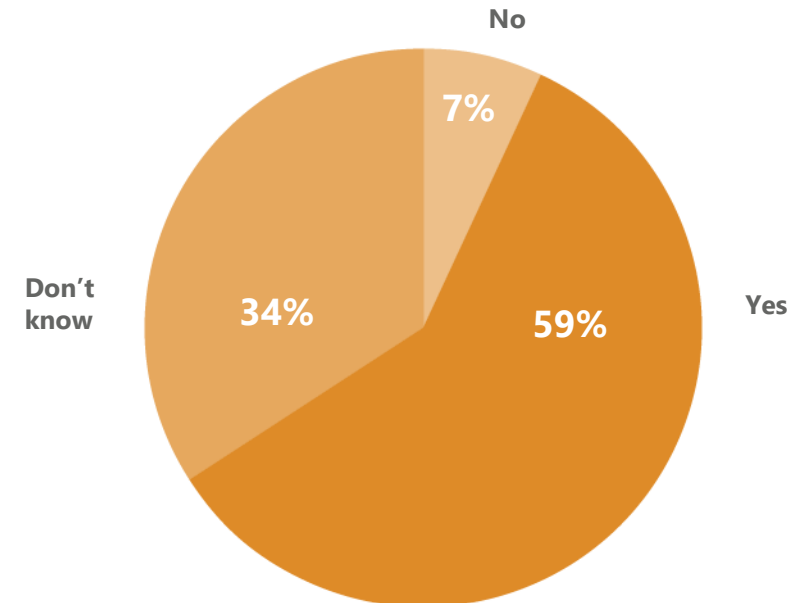
## Awareness of Agri-Food Regulator Operating a Confidential Complaints Process

Base: All suppliers - 306  
Q.26/27

Awareness of Agri-Food Regulator Operating a Confidential Complaints Process



Would You Raise a UTP With The Agri-Food Regulator?



Almost half of suppliers are aware of the Agri-Food Regulator operating a confidential complaints process.  
6 in 10 of the suppliers surveyed would raise a UTP with the Agri-Food Regulator.



## Reasons You Would Not Raise A UTP With The Agri-Food Regulator

*"Not sure if the buyer would retaliate in the future."*

*"Given the small number of growers and buyers, it's not clear how any specific complaint would not be obvious to the buyer."*

*"Not sure if the buyer would retaliate in the future."*

*"The negative implications of raising an unfair trading practice complaint and the time involved in doing so, might be counterproductive."*

*"Slow, bureaucratic and we operate in a fast-moving consumer market - so we would be delisted by the time the complaint was dealt with."*

*"It can be resolved locally."*

*"It's hard to know whether or not we would raise an issue. It would have to be affecting our business in a pretty big way in order to raise it for fear that the confidentiality could be breached, and we could be blacklisted."*

*"I believe if an issue was raised with certain retailers, they could easily figure out which supplier it was based on the products or query raised and therefore lead to negative relationship with them."*

# Appendix

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# Appendix - I

Please see below full list of answer options for Q.8a/b.

|   |
|---|
| Q.8a/b: <b>Unconditional UTPs</b>   |
| Payment later than 30 days after the end of an agreed delivery period for perishable agricultural and food products   |
| Payment later than 60 days after the end of an agreed delivery period for non-perishable agricultural and food products   |
| Cancellations of orders for perishable agricultural and food products with less than 30 days' notice  |
| Unilateral contract changes by the buyer relating to any of the following:<br>(a) the frequency, method, place, timing or volume of the supply or delivery of agricultural and food products,<br>(b) the quality standard,<br>(c) the terms of payment or the price |
| Requirement for supplier to make a payment not related to the sale of the agricultural and food products of the supplier  |
| Requirement for supplier to pay for the loss or deterioration of their product where it is not caused by the negligence or fault of the supplier  |
| Refusal of written confirmation of a supply agreement by the buyer, despite request of the supplier   |
| Any unlawful acquisition, use or disclosure of trade secrets by the buyer   |
| Commercial retaliation or threat of such by the buyer against the supplier because the latter are exercising their contractual or legal rights including filing a complaint with the Agri-Food Regulator  |
| Requirement for compensation to the buyer for the cost of examining customer complaints where there has been no negligence or fault by the supplier   |
| Don't know  |
| None of these   |

## Appendix - II

Please see below full list of answer options for Q.9a/b.

|  |
|--|
| Q.9a/b: <b>Conditional UTPs</b>  |
| Has a buyer returned unsold products to you without paying for those unsold products or without paying for the disposal of those products where this has not been clearly agreed between you beforehand?                                       |
| Has a buyer required payment from you as a condition for stocking, displaying or listing your agricultural and food products or of making such products available on the market where this has not been clearly agreed between you beforehand? |
| Has a buyer required you to bear all or part of the cost of any discounts on agricultural and food products that are sold by the buyer as part of a promotion where this has not been clearly agreed between you beforehand?                   |
| Has a buyer required you to pay for the marketing of agricultural and food products by the buyer where this has not been clearly agreed between you beforehand?  |
| Has a buyer required you to pay for the advertising of agricultural and food products by the buyer where this has not been clearly agreed between you beforehand?  |
| Has a buyer charged you for staff for fitting out premises used for the sale of your products where this has not been clearly agreed between you beforehand?   |
| Don't know   |
| None of these  |

## Appendix - III

Please see below full list of answer options for Q.15/16.

| Q.15/16: <b>Issues Experienced</b>   |
|--|
| Excessive requests for changes to supply agreements  |
| Product shrinkage related issues   |
| Product waste related issues   |
| No process in place to challenge invoice discrepancies   |
| Delays or non-payment when there are delivery disputes   |
| Requests for payments (including free stock) to keep your existing business with a buyer (pay to stay)                       |
| Requests for payments (including free stock) relating to product position in store   |
| Incurring significant costs because of inaccurate forecasting by a buyer where you are not aligned with the buyers' forecast |
| Not being permitted to input into forecasting process  |
| Overbuying at promotional price and subsequently selling at full price   |
| Issues related to cost price increase (CPI) requests   |
| Issues related to cost price decrease (CPD) requests made by your buyer  |
| Dispute resolution process too lengthy or cumbersome   |
| De-listing (including significant reduction in volume) without reasonable notice   |
| Other issue or for additional detail on any issues experienced (Please Specify)  |
| Don't know   |
| None of these  |



# Appendix - IV

Please see below for the short form name as used in the survey results and the retailer and wholesalers’ full company name.

| Short Form | Company Name                          |
|------------|---------------------------------------|
| Aldi       | Aldi Stores (Ireland) Limited         |
| BWG        | BWG Foods Unlimited Company           |
| Dunnes     | Dunnes Stores Unlimited Company       |
| Lidl       | Lidl Ireland GmbH                     |
| M&S        | Marks and Spencer (Ireland) Limited   |
| Musgrave   | Musgrave Group Public Limited Company |
| Sysco      | Sysco Foods Ireland Unlimited Company |
| Tesco      | Tesco Ireland Limited                 |



The Supplier Survey 2025 responses were collated and analysed by Coyne Research on behalf of An Rialálaí Agraibhia (Agri-Food Regulator).

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Coyne Research,  
16 The Courtyard,  
Kilcarbery Business Park,  
Dublin D22F6K2  
Ireland.  
[info@coyneresearch.com](mailto:info@coyneresearch.com)  
+353 (0)1-461 1040





# An Rialálaí Agraibhia Agri-Food Regulator

Promoting fairness and transparency in the agri-food supply chain

Backweston Campus  
Celbridge  
Co Kildare  
Ireland  
W23 X3PH

☎ +353 (0)1 601 9900  
✉ [info@agrifoodregulator.ie](mailto:info@agrifoodregulator.ie)  
🌐 [www.agrifoodregulator.ie](http://www.agrifoodregulator.ie)

✉ [agrifoodreg](#)  
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✉ [agrifoodregulator.ie](#)  
📱 [agrifoodregulator](#)