



FORWARD
INSIGHT AND STRATEGY

Unlocking value:
Workshop series

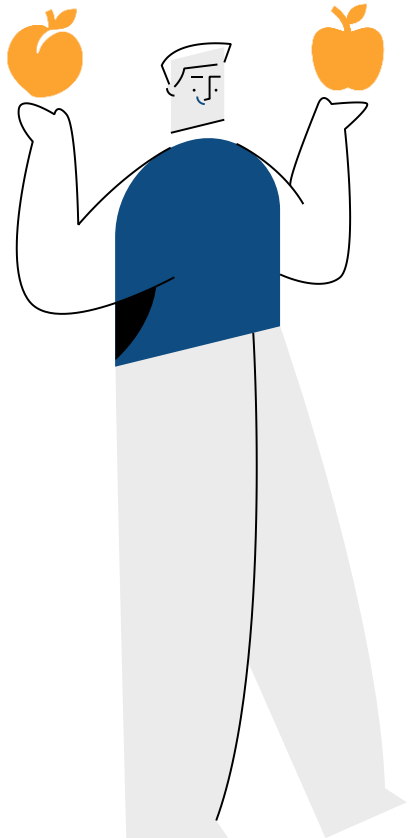
KNOW YOUR CUSTOMER



**Why it is important to
have a customer
focus?**

**Our customers and consumers
are ultimately
why we are here**





UNDERSTANDING who they are and what they value will help:

- ▶ Deliver what the market wants
- ▶ Anticipate future demand and value
- ▶ Understand how to differentiate – and stand apart
- ▶ Respond to change

We are seeing rapid change in the global horticultural **market environment**

Global consolidation

Large retail and global marketers/
distributors are dominating and
are increasingly consumer led

Quality increasing

Quality gaps are
closing

Extended supply windows

Supply window
advantages are closing

New/better/different varieties

Impacting
premium demand

Branding – delivering value & trust

Brands are increasingly controlling
retail supply contracts

Distribution models are changing and who is influencing demand is shifting – toward the **retailer and end consumer**

Path to market:



Influencing demand:

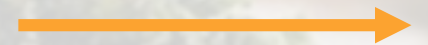


Produce retail supply channels are shifting

Supermarket



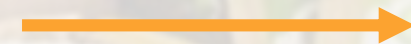
On line ordering and fulfilment



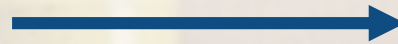
Fruit and vegetable stores



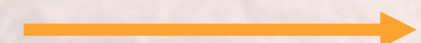
Speciality fresh retail



Traditional produce markets



Meal solution food bags



HARRIS FARM
MARKETS

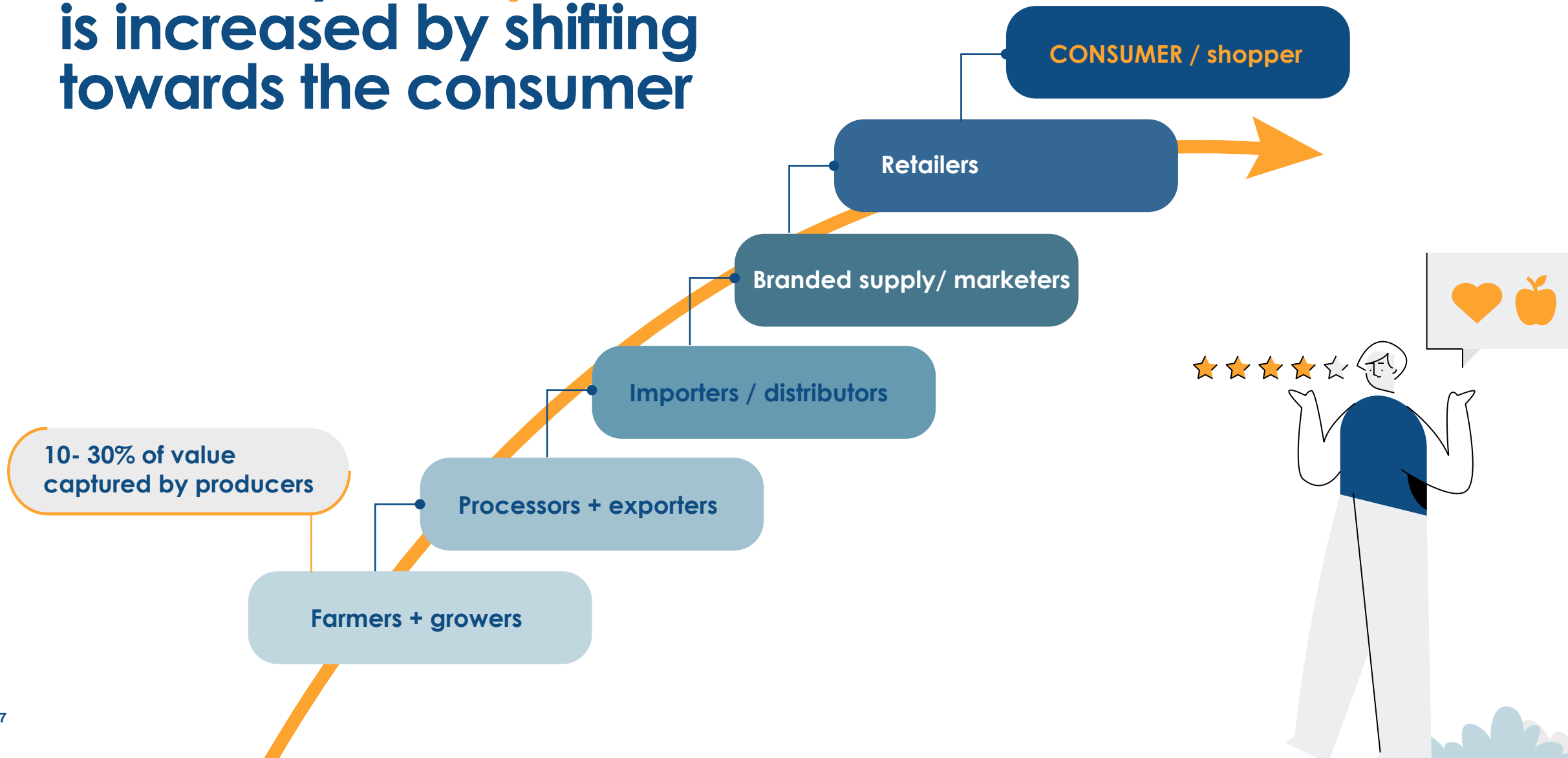
MORE MARKET THAN SUPERMARKET

Natural food is one of life's true joys – and shopping for it should be too! We deliver fresh fruit and veg from the markets every day and hunt down specialty products from artisan producers all over the country.

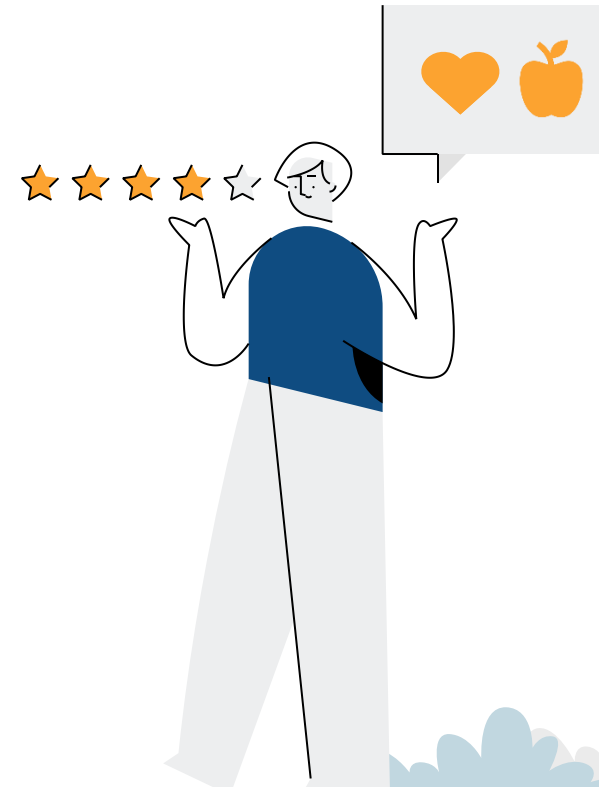
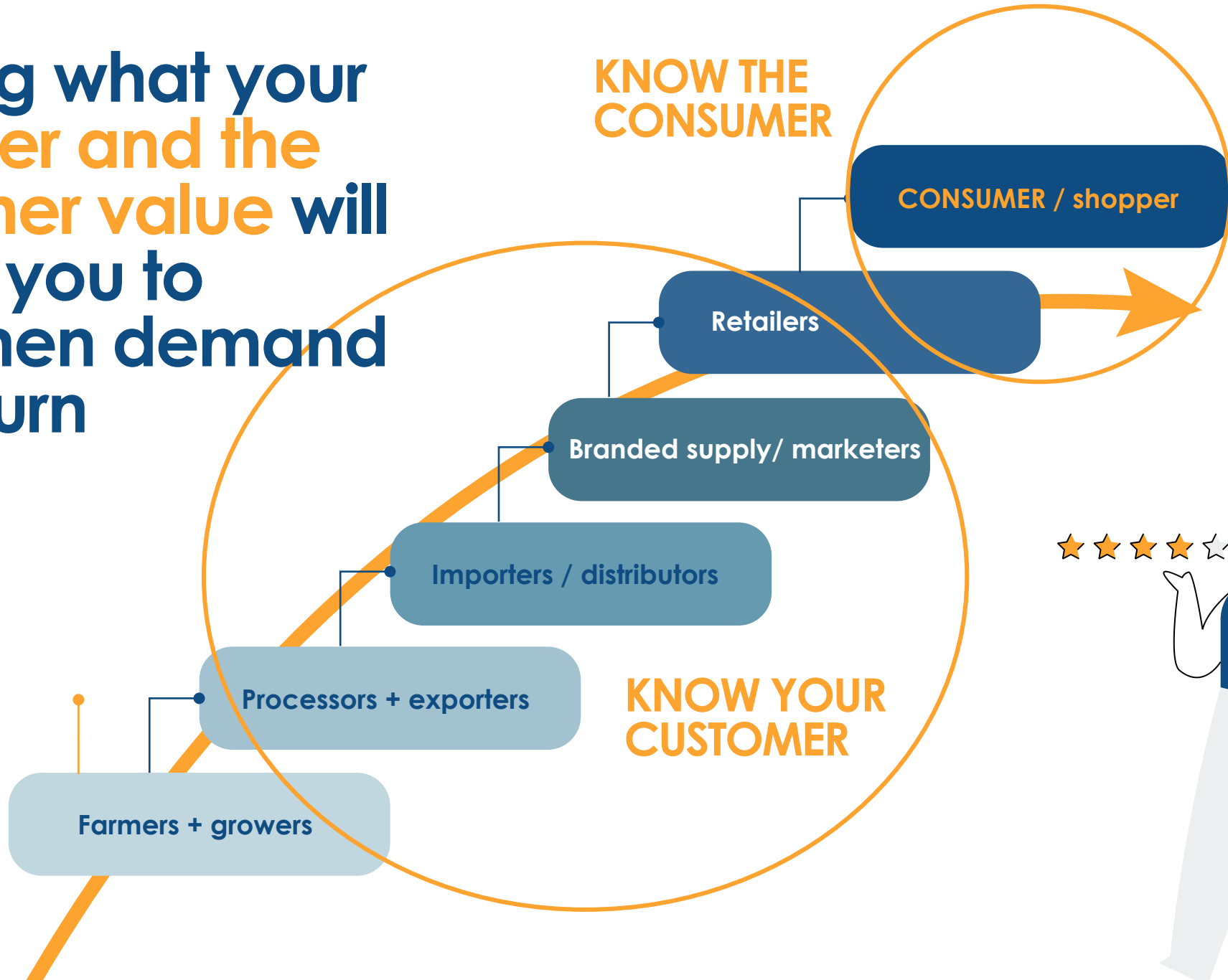
[LEARN ABOUT OUR VALUES →](#)



The ability to **capture value** is increased by shifting towards the consumer



Knowing what your
customer and the
consumer value will
enable you to
strengthen demand
and return



KNOWING YOUR CUSTOMER

supply chain focus



What does your direct customer value?

PRODUCT

What you produce

PROCESS

How it is produced

What is your competitive advantage?

What could it be?



What does your direct customer value and why?



What does your direct customer value?

PRODUCT

PROCESS

What does your customer value now?

What are their issues / tensions / challenges with produce supply in your category?

What will they be looking for more (and less) in the future?

What is your competitive value & strength now?

What could your competitive value / advantage be in the future?

Top tips:

Understanding the **tensions for your customers** can offer you opportunity - **what they would like to solve**

Knowing who your **key competitors** are, what they are delivering and how is this changing.....

Having a clear point of difference that is valued gives you a competitive advantage

If you don't know ask

KNOWING YOUR CONSUMER



Who is your shopper and consumer?

Which
MARKET

Which
MOMENT

Which
MINDSET

Which
MIX

Local

National

International



Emotive need

Experiential need

Functional need

What you
deliver

SCALE

Who is your shopper and consumer?

KEY QUESTION

Is the market you are currently selling in delivering the greatest return?

KEY TIP

Information on markets and market access and opportunity is available through:

- Fruit Growers Tasmania
- Sector organisations
- International Fresh Produce Association Australia & New Zealand



Who is your shopper and consumer?

KEY QUESTIONS

What are the **purchase** and **consumption** moments:

- For your category?
- For what you produce & deliver – your unique offer?

What is the mindset at that moment – what does the consumer value?

Is there an opportunity to deliver better or differently to meet needs?

KEY TIP

Go and visit your markets

Visit retail stores – talk to shoppers, look at choice and what is changing

If investing in change or building and developing brands, market research makes a difference –
targeting investment to drive value growth

Which
MOMENT

Which
MINDSET



Emotive need

Experiential need

Functional need

What do your **consumers** and **shoppers** value?



Grower and marketer implications

Grading for consistency

Grade standards

Premium varieties

High brix / flavour / texture

better taste from different growing systems or environment

Appearance / colour / texture

Freshness – eating and storage window

Relevant size / shape

Convenient packaging / size options

Prewashed / pre-cut / pre-mixed

Availability – right place

Visibility – quality easily recognised

Branding

Low sprays – low agrichemicals

Sustainable packaging – less plastics

Regenerative, biodynamic, organic, field grown, hydroponic

Tasmanian origin

Food safety assurance

Origin assurance – traceability – certification

Our consumers and shoppers...

Are willing to pay more for what is important to them

Key question:

Are you optimising value across your crop?

What can you do to elevate value return:

- **Delivering more of what the consumer wants**
- **Deliver a differentiated product and 'story' that stands apart**
- **Be available and visible in the right place**

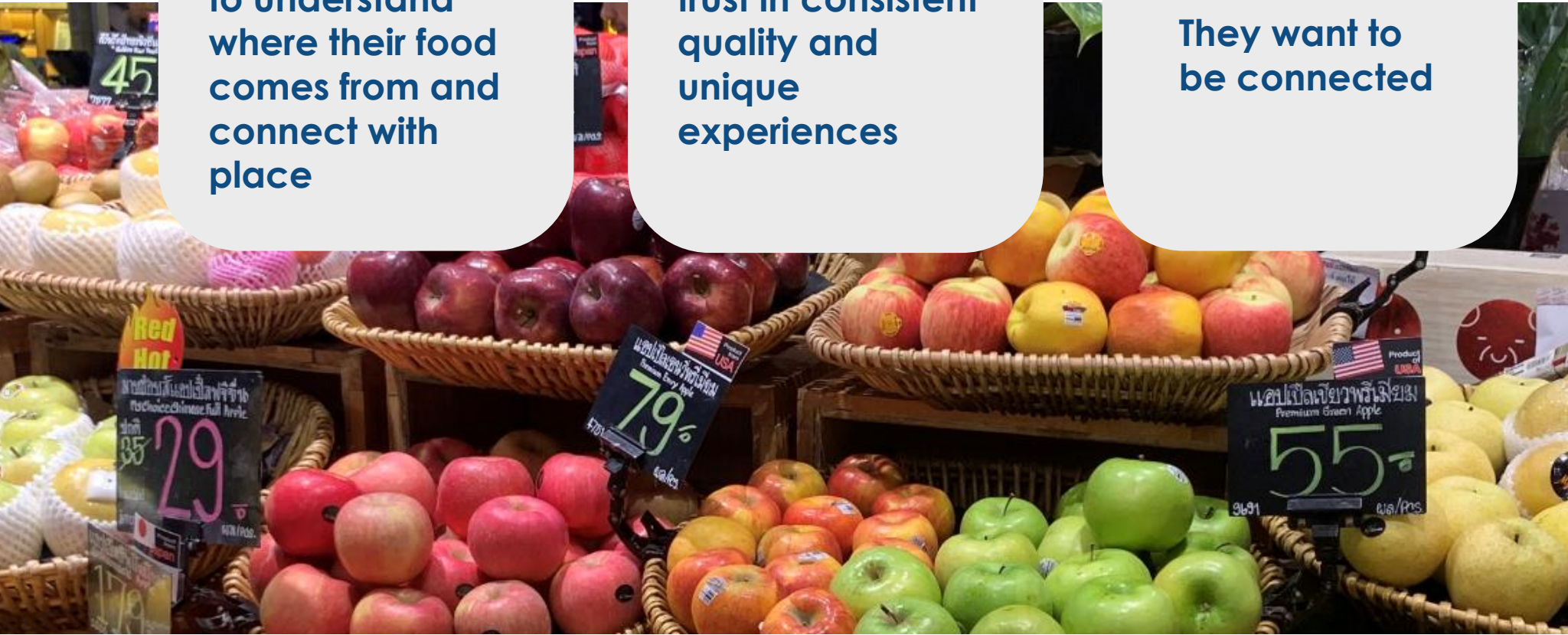


Brands and origin brands are important in the primary sector

Consumers want to understand where their food comes from and connect with place

They want to trust in consistent quality and unique experiences

They want to be connected



Who is your consumer?

For your current product/ offer in your category

Which market?



Which moment?



Which Mindset?

Experiential need
The product

Emotive need
The feeling

Functional need
The reason to believe

PREMIUM GRADE

SECOND GRADE

Which market will deliver the strongest return

What is the occasion – when is this product used

What do people need and want to experience on this occasion

What How do they want to feel

What supports this – eg price, origin, grading, packaging, branding – the grower and marketer point of difference

What does your end consumer value?

	MOMENT and Mindset CONSUMING	MOMENT and Mindset SHOPPING
What is important for the consumer		
Potential issues		
How well do you deliver now?		
Do you have a point of difference that people value?		
What could you do to capture more value / advantage in the future?		

Top tips Consumer:

Go and visit your markets

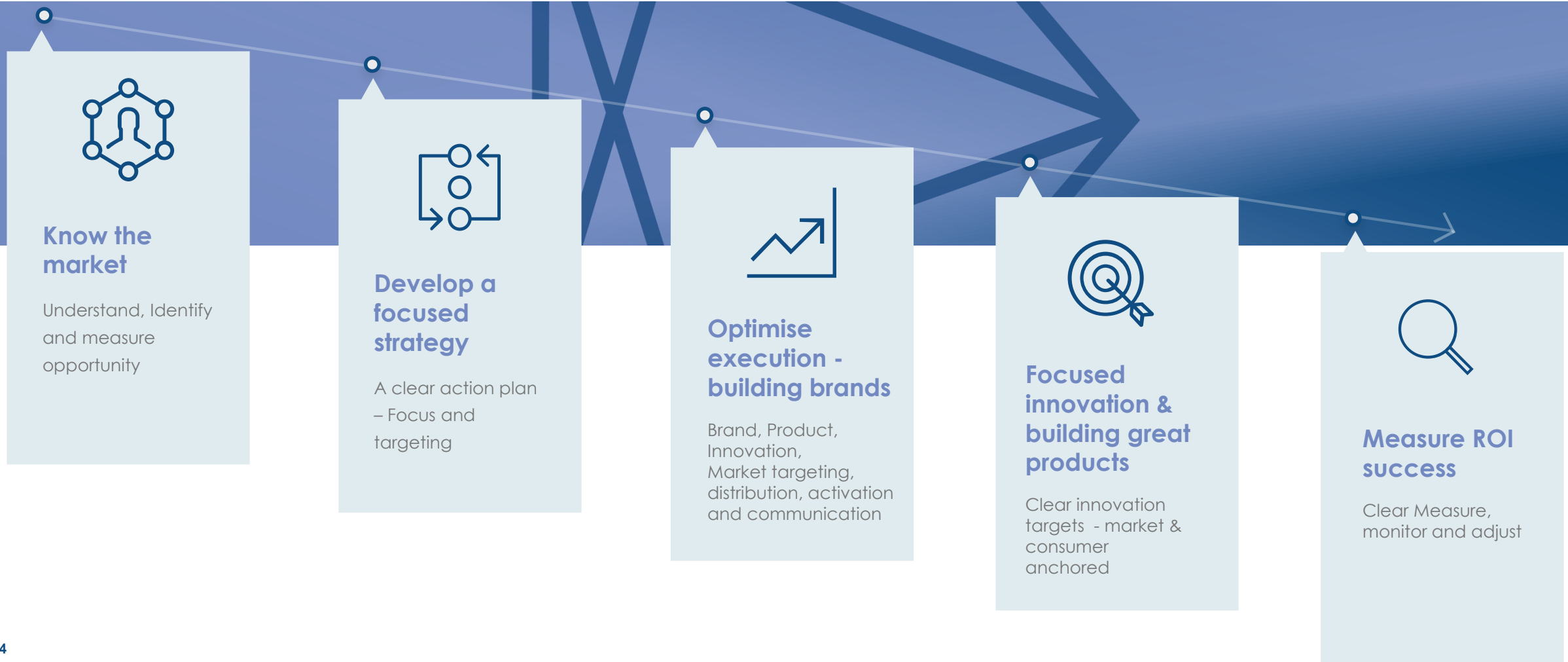
Visit retail stores – **Do your own research** - talk to shoppers, look at choice and what is changing

If building and investing in change or developing brands, **market research** makes a difference – targeting investment to drive value growth

Having a **clear point of difference and a story** that is valued to drive higher value demand

Be clear on where produce **branding** fit into your business – it is part of the future

Insights process – to focus for the future





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FORWARD
INSIGHT AND STRATEGY

About forward.

Forward is a specialist insights and strategic planning agency, focused on building value for global Primary Sector and Food & Beverage organisations and brands.

With a global presence, we work with you to understand your markets, develop focused growth strategy and build remarkable brands on the basis of great products.

Putting your customers at the heart of decision-making

FORWARD

Building brand value in international markets

