



Imperial College  
London

# Looking Into the Future: Opportunities for New Zealand

Dr. David Hughes  
Emeritus Professor of Food Marketing

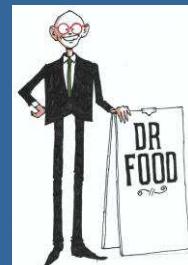
Natural Products NZ Summit 2016  
The Rutherford Hotel, Nelson  
**Thursday, March 17<sup>th</sup>, 2016**



@profavidhughes

[www.supermarketsinyourpocket.com](http://www.supermarketsinyourpocket.com)

[www.drfood.ca](http://www.drfood.ca)



# Australia's Woolworths sees 33% fall in profits

February 26<sup>th</sup>, 2016

7 hours ago | Business



Woolworths is Australia's largest supermarket chain but it has been up against rivals such as Coles and Aldi

Australia's biggest supermarket chain Woolworths has posted a 33.1% fall in profits for the six months to December.

And we're  
really sorry  
for them!

(schadenfreude  
is never pretty!)

It's been a little uncomfortable for the UK  
“Big Boys” and we're all very sorry for them, too!

A close-up photograph of a stainless steel garlic press. A single, brown, textured walnut is positioned in the center of the press, illustrating the concept of being "squeezed" between two larger entities.

TESCO

ASDA

The co-operative



MORRISONS

Sainsbury's

Squeezed between hard discounters  
and premium retail and cannibalizing  
Their Own Flagship Big Sheds!

Waitrose

# Tough Trucking in Many Grocery Retailing Sectors

- Aldi/Lidl continue to increase grocery market share
- Dollar (£) stores nibbling away compounds problems
- “Non-Grocers” enter grocery – Boots UK, Shoppers Drug Mart Canada, Costco thrives, & aaaagh Amazon!
- Big fmcg goes direct to consumers
- Artisans make direct connections with consumers
- Food service strikes back with home delivery
- Big Box store volumes squeezed by strong growth in convenience stores and on-line grocery shopping
- Convenience store sector consolidating
- Slow economic growth and low inflation



Sir easyJet dabbles in grocery!



Dr. Food

@ProfDavidHughes

[Follow](#)

easyFoodstore N. London: I'm 126th in Q with 1 hour wait to enter. Equal mix press, voyeurs (inc. me) & poor people.

10:46 AM - 5 Feb 2016

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# Sainsbury's

Queens Road, Wimbledon: front door of Blake Hughes & Family: "This house doesn't work without Mr. Sainsbury (well, Kevin) dropping the shopping off on a Sunday night"!



## The Online Shopper Profile



**Source:** McCrindle Research Survey, July 2014; Market Blueprint (electronic spend) data with 34% cash adjustment for offline spend provided by Quantum; Woolworths Online Shopper Profile & Database; and future projections from Professor Jan Recker, QUT.



## Routine but Important Purchases:

- water
- pet food
- detergents and household cleaners
- paper goods

Household Inventory Managed by Consortium of Key Suppliers



# INTRODUCING amazon pantry

Everyday Essentials  
in Everyday Sizes



## Good Morning Themed Box

[Shop now](#)



## Christmas Cleaning Made Easy

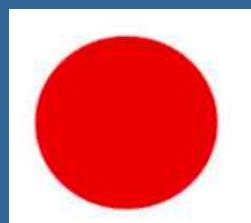
[Shop now](#)



# Monks Delivered Via Amazon as Role of Japanese Temples Fade



Want a Monk for a Wedding, Special Occasion?  
Or We Could Do You a Couple of Attractive Herdsmen?





# Amazon, eBay and ShopClues see cow dung patties selling like hot cakes

Do Export opportunities Beckon?!





# FRESH INGREDIENTS AND DELICIOUS RECIPES DELIVERED TO YOUR DOOR. SIMPLE. HEALTHY. DELICIOUS.

## MY **Family** FOODBAG

Family favourites that'll please the fussiest eaters. Quick, healthy and yummy recipes for you and your little ones.

**5 recipes every week**  
**5 meals for 2 adults and 2 to 3 children**  
**Auckland, Hamilton & Wellington**

**\$159 .00**  
Per week  
Free Delivery

## MY **Classic** FOODBAG

Classic recipes with a twist. Ideal for busy families with older kids who want healthy food and delicious recipes.

**5 recipes every week**  
**5 meals for 4 adults or a family of 5**  
**Auckland, Hamilton & Wellington**

**\$189 .00**  
Per week  
Free Delivery

## MY **Gourmet** FOODBAG

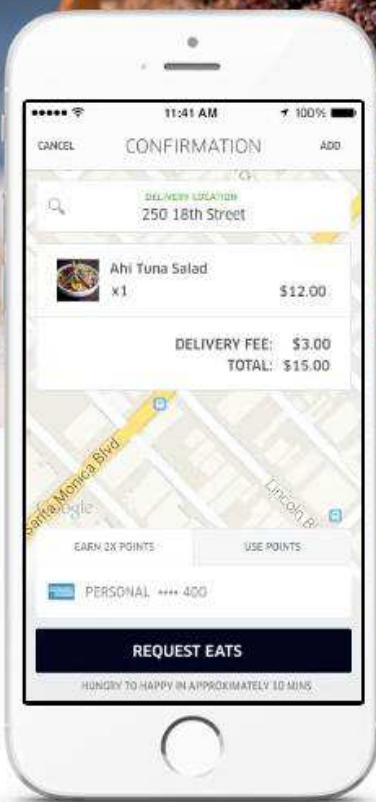
Premium produce and inspiring recipes. Ideal for couples who love fresh food and enjoy exotic flavours.

**4 recipes every week**  
**4 meals for 2 adults**  
**Auckland, Hamilton & Wellington**

**\$139 .00**  
Per week  
Free Delivery



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## From tap to table in minutes

UberEATS delivers the best of your city right when you want it. Our curated menus feature dishes from the local spots you love. And the ones you've always wanted to try. It's same cashless payment as an Uber ride. So just tap the app, meet your driver outside, and enjoy.

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ENTER 6GRRX at the checkout by 31.01.16. Exclusions apply.  
Credit is provided subject to status, by Shop Direct Finance Company Limited.

Representative  
**39.9% APR**  
variable

**MORE INFO >**

## Brand Spectacular

Limber up those shopping fingers, we've got brand new collections from your high-street favourites

**SHOP NOW >**

On-Line Fashion Store **VERY** has 1.2 Million Versions of its Home Page.  
“Give them what they want fast but surprise them every now and again!”

# WHO boss says Big Food, Big Soda and Big Alcohol as bad as Big Tobacco



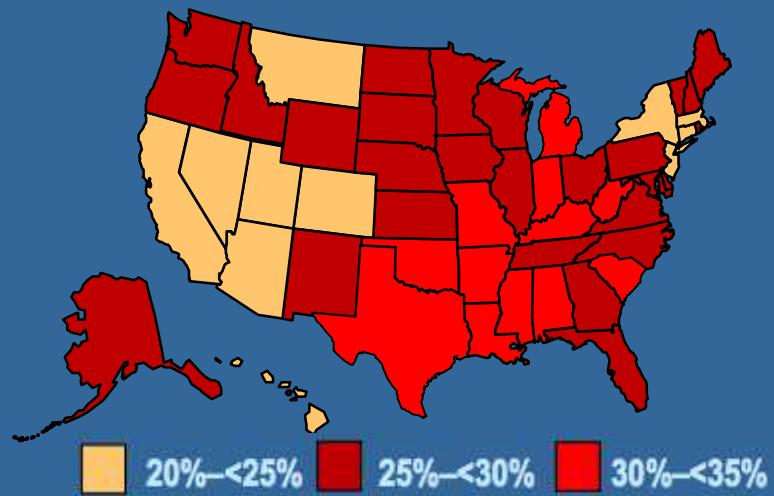
Public health faces "daunting challenge" from "Big Food", Dr Chan believes

## Mexico takes title of "most obese" from America



by Marion Nestle

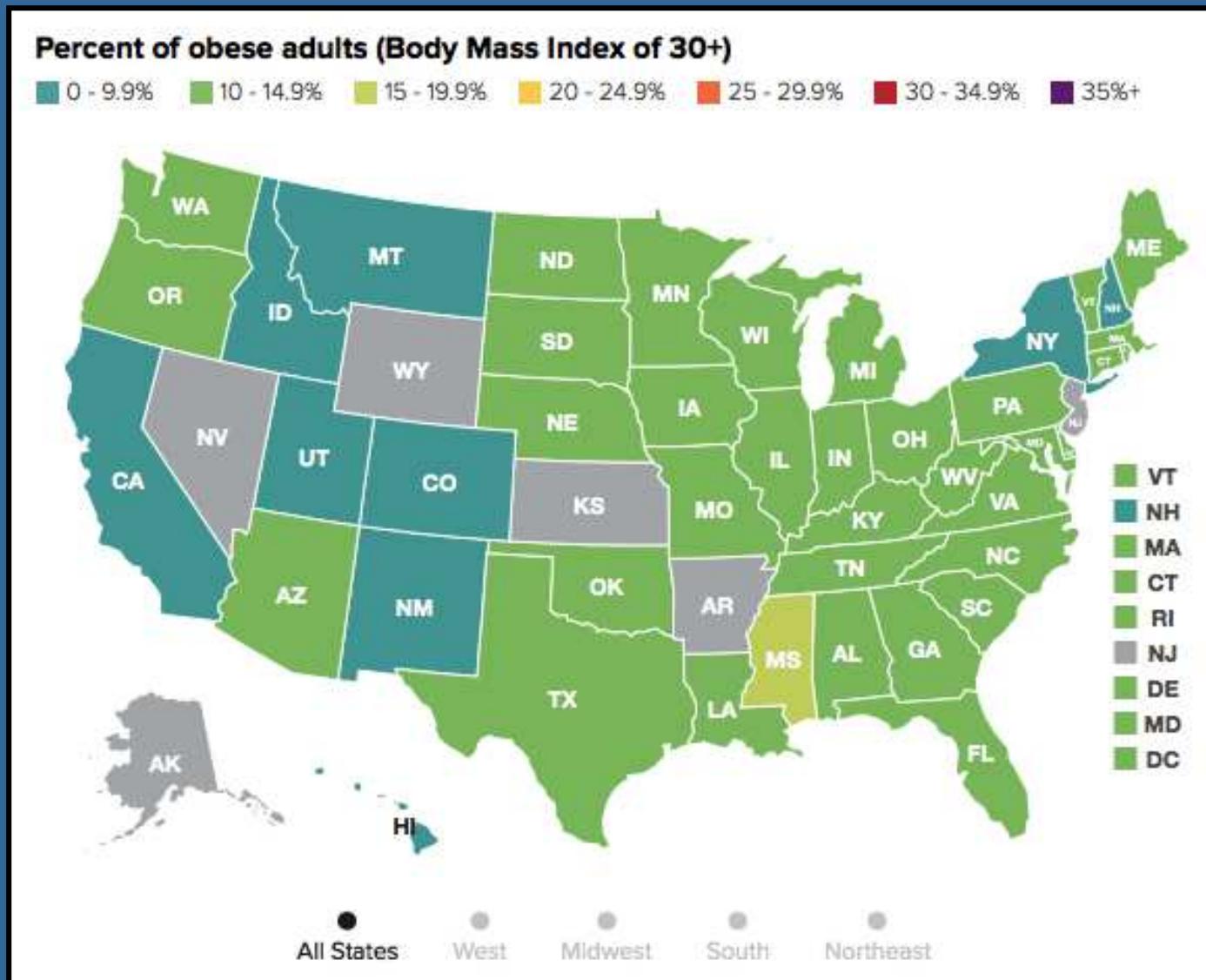
JUN World Health Organization takes on the food industry  
Self-Reported Obesity Among U.S. Adults



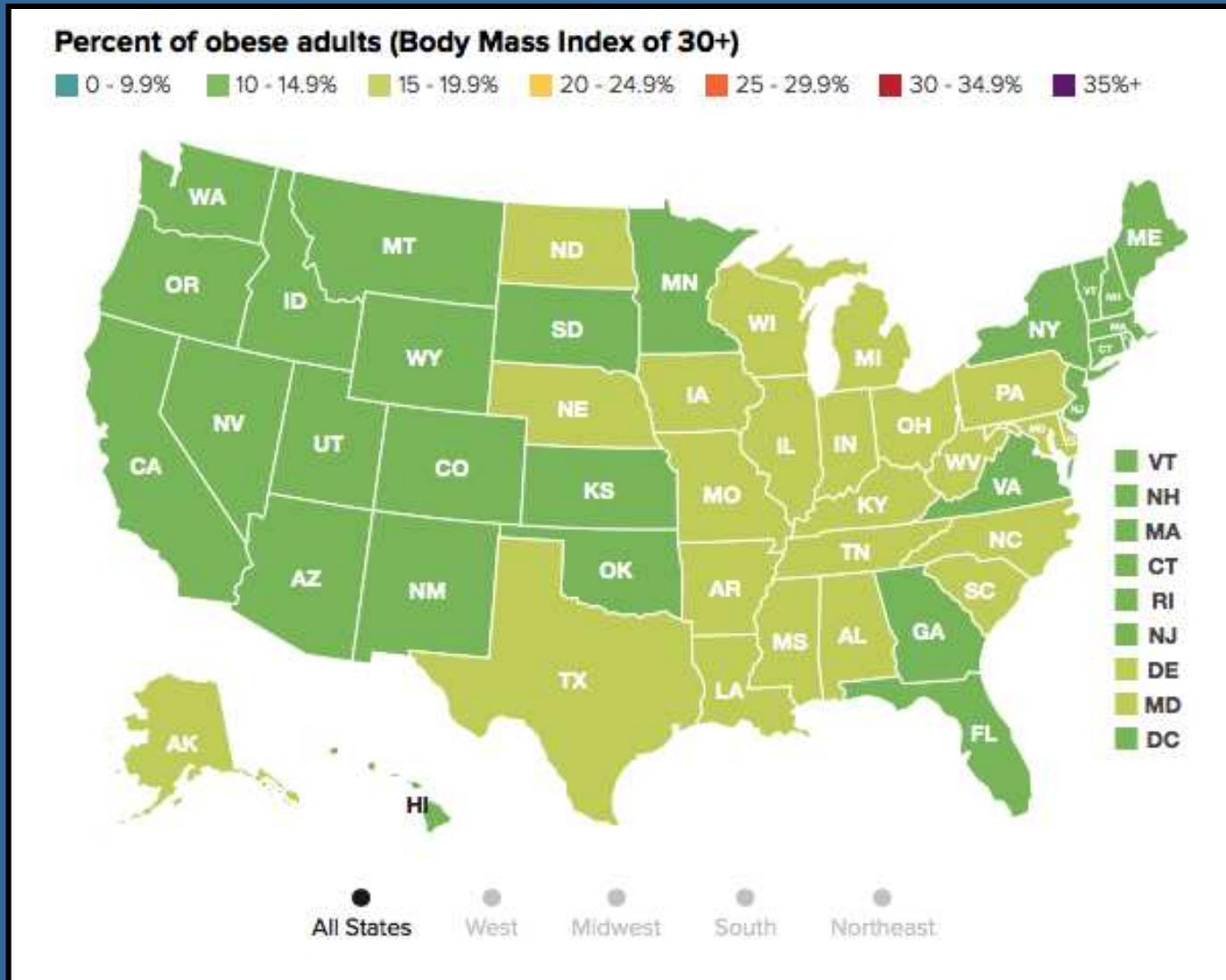
Australia rates 3rd or 4th in obesity

Australian obesity rates climbing faster than anywhere else in the world, study shows

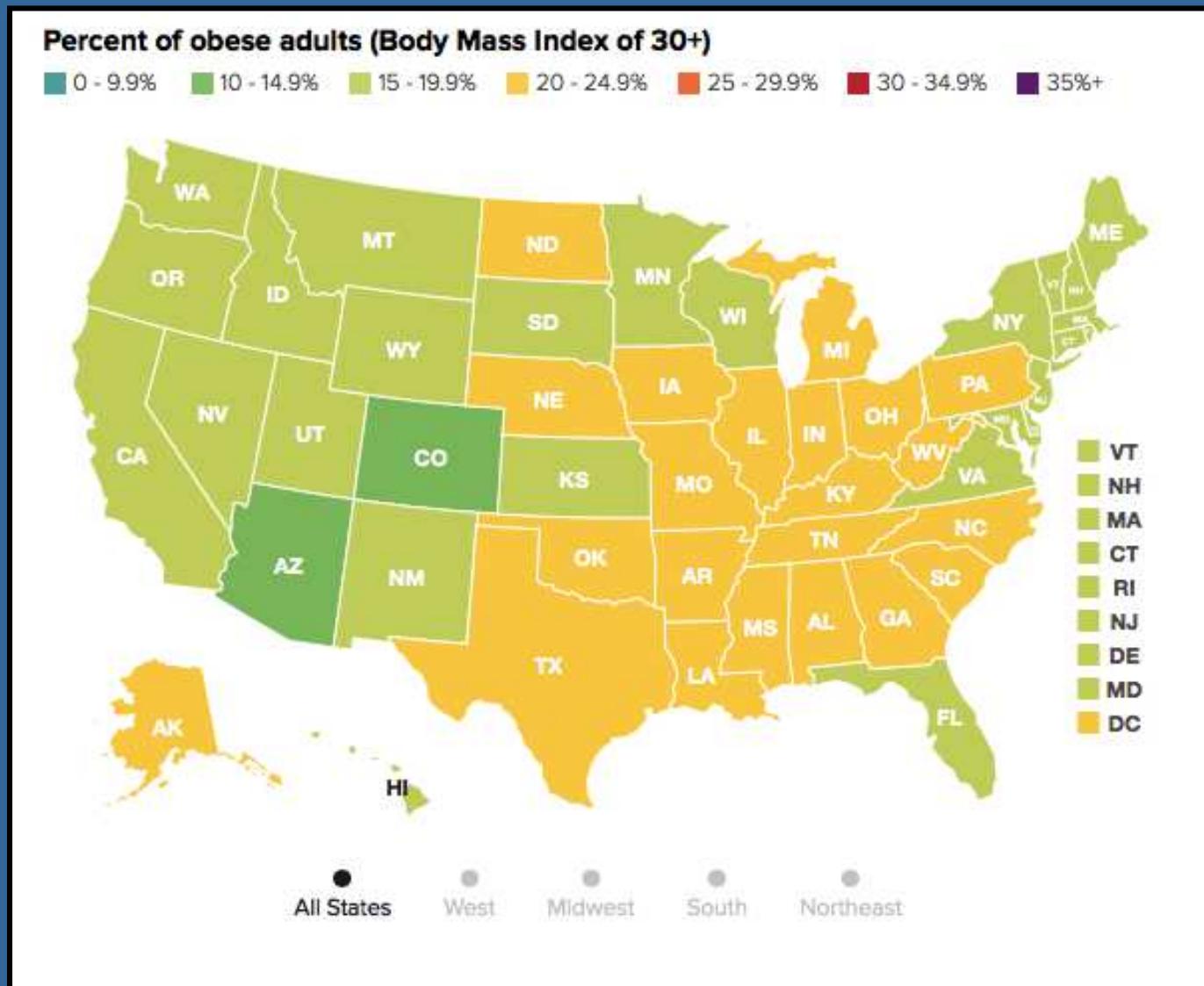
# USA Adult Obesity Rate by State, 1990



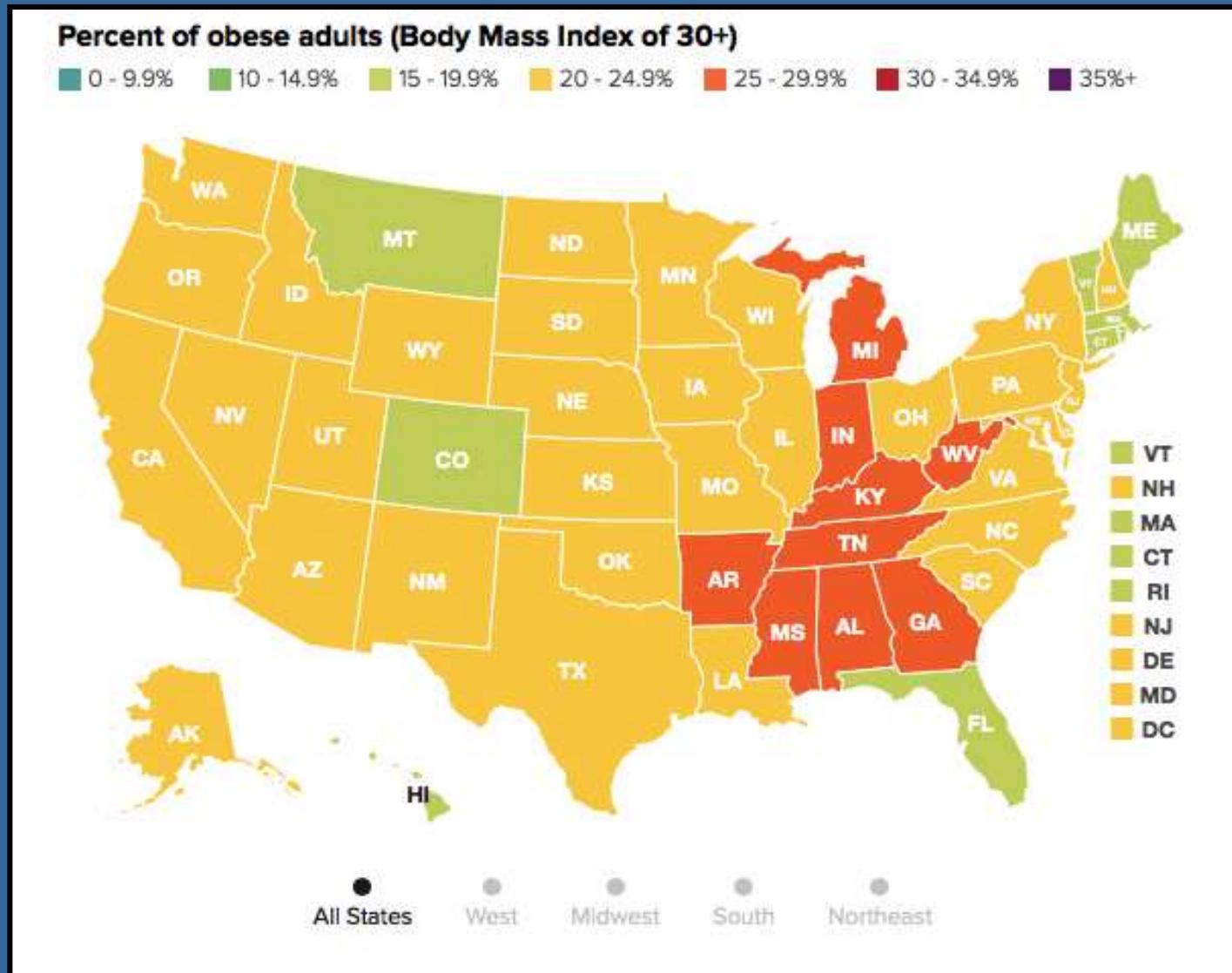
# Adult Obesity Rate by State, 1995



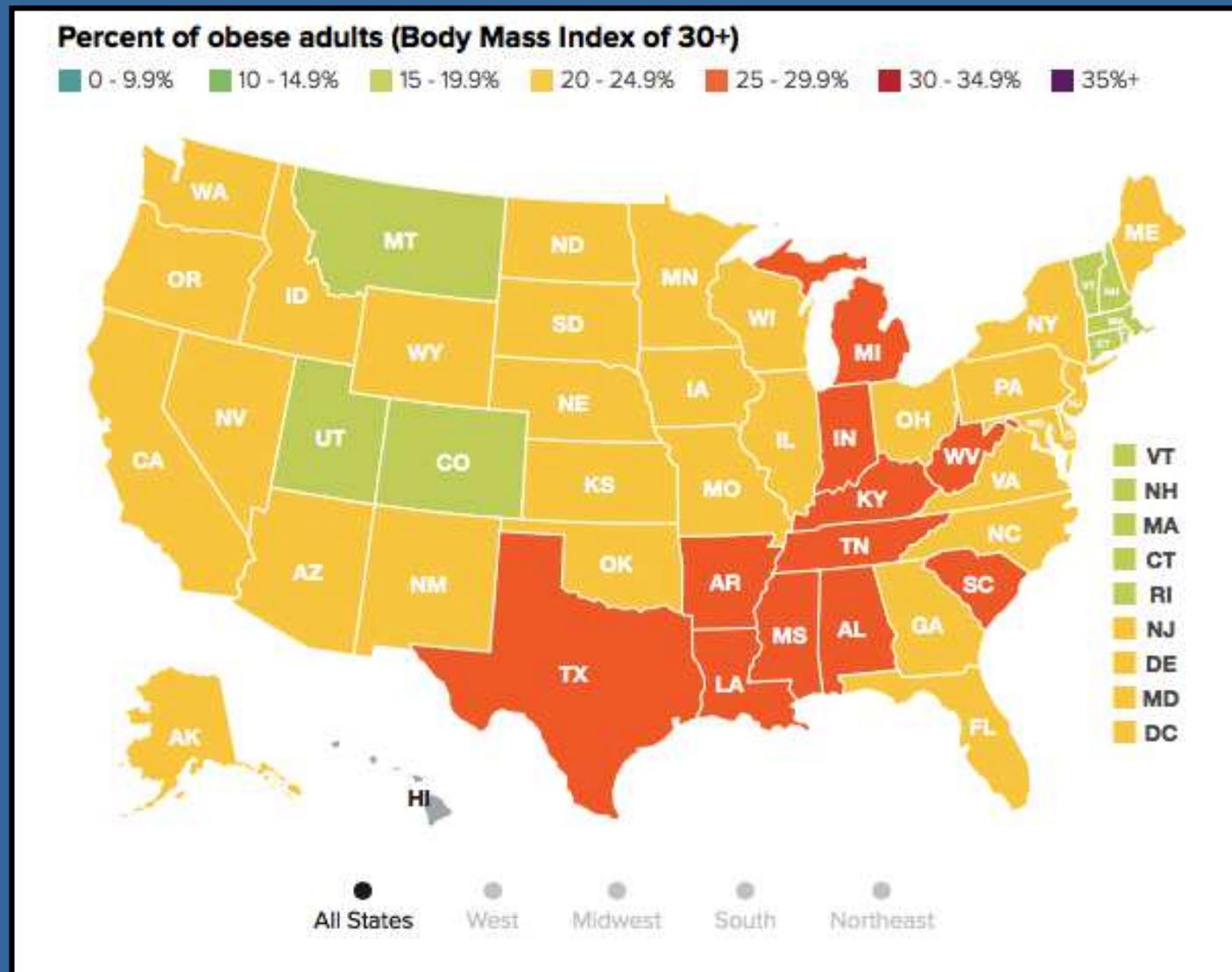
# Adult Obesity Rate by State, 2000



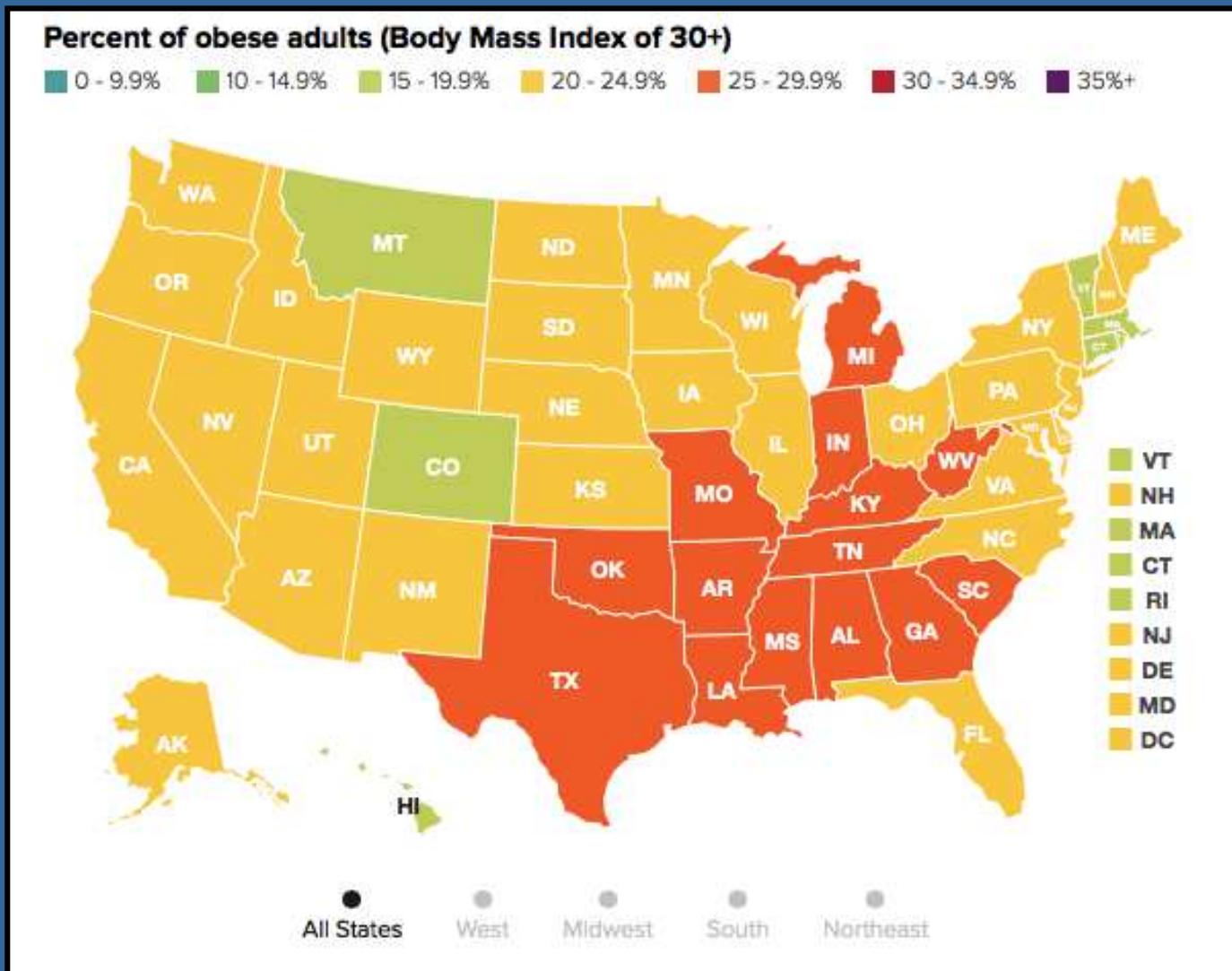
# Adult Obesity Rate by State, 2003



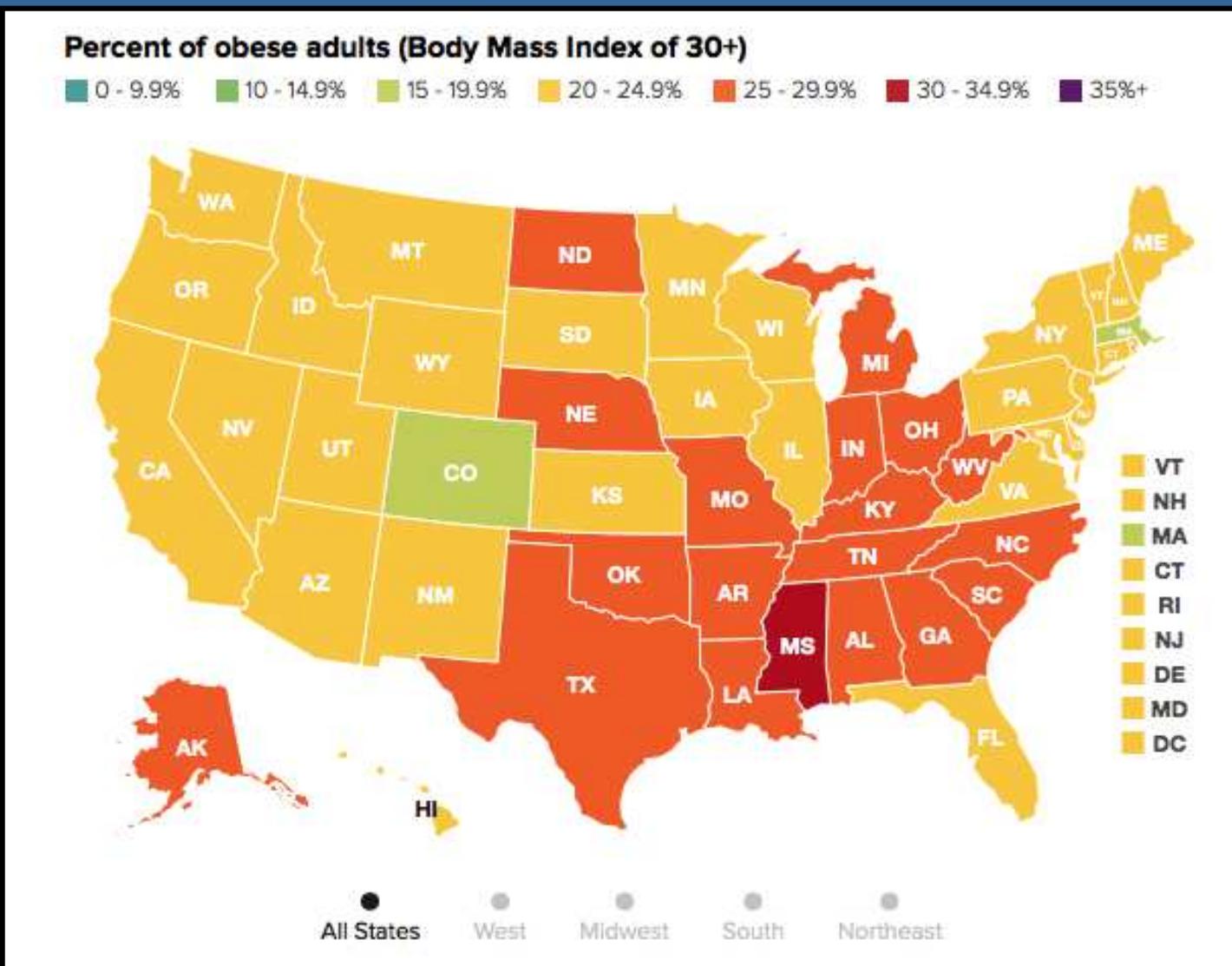
# Adult Obesity Rate by State, 2004



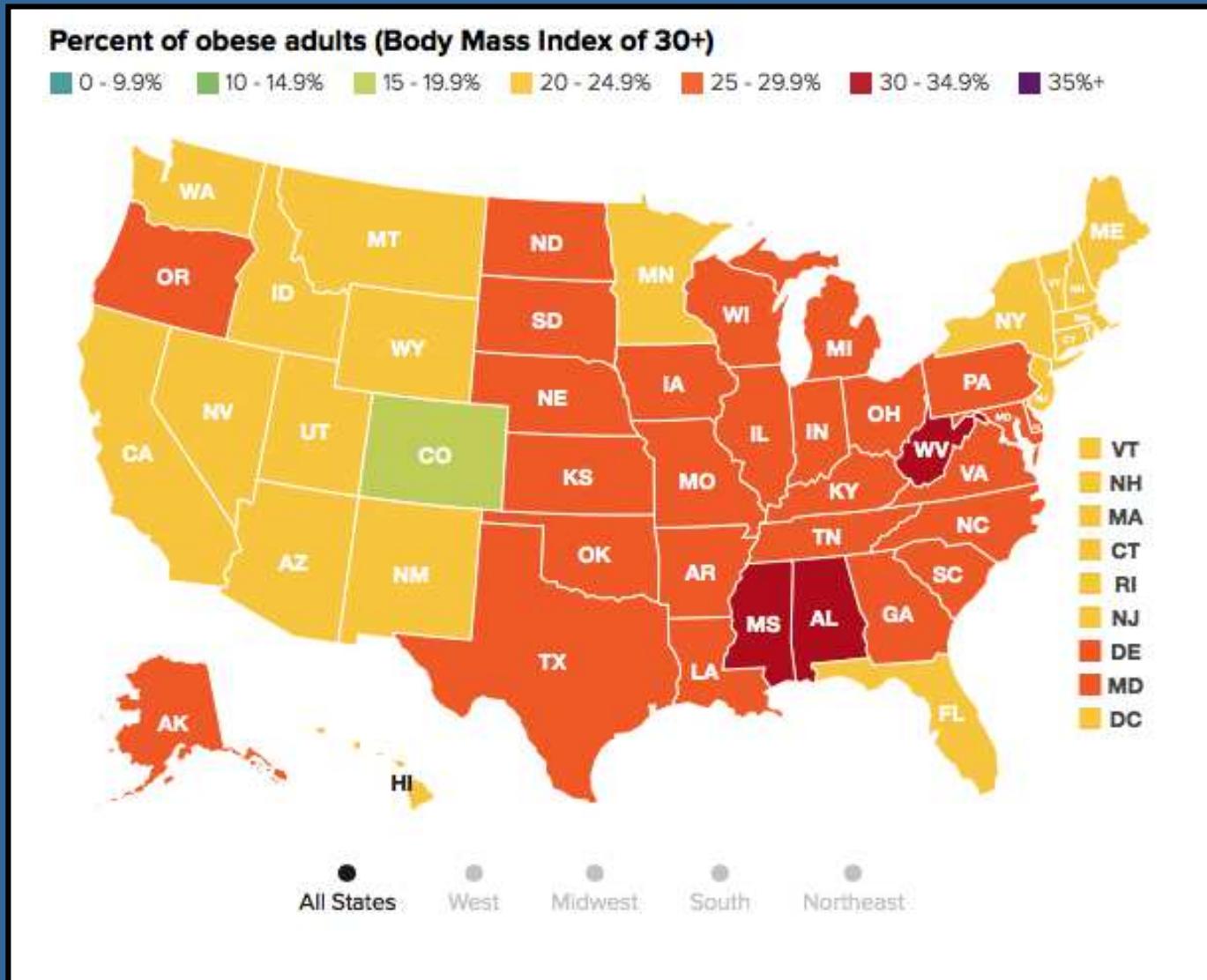
# Adult Obesity Rate by State, 2005



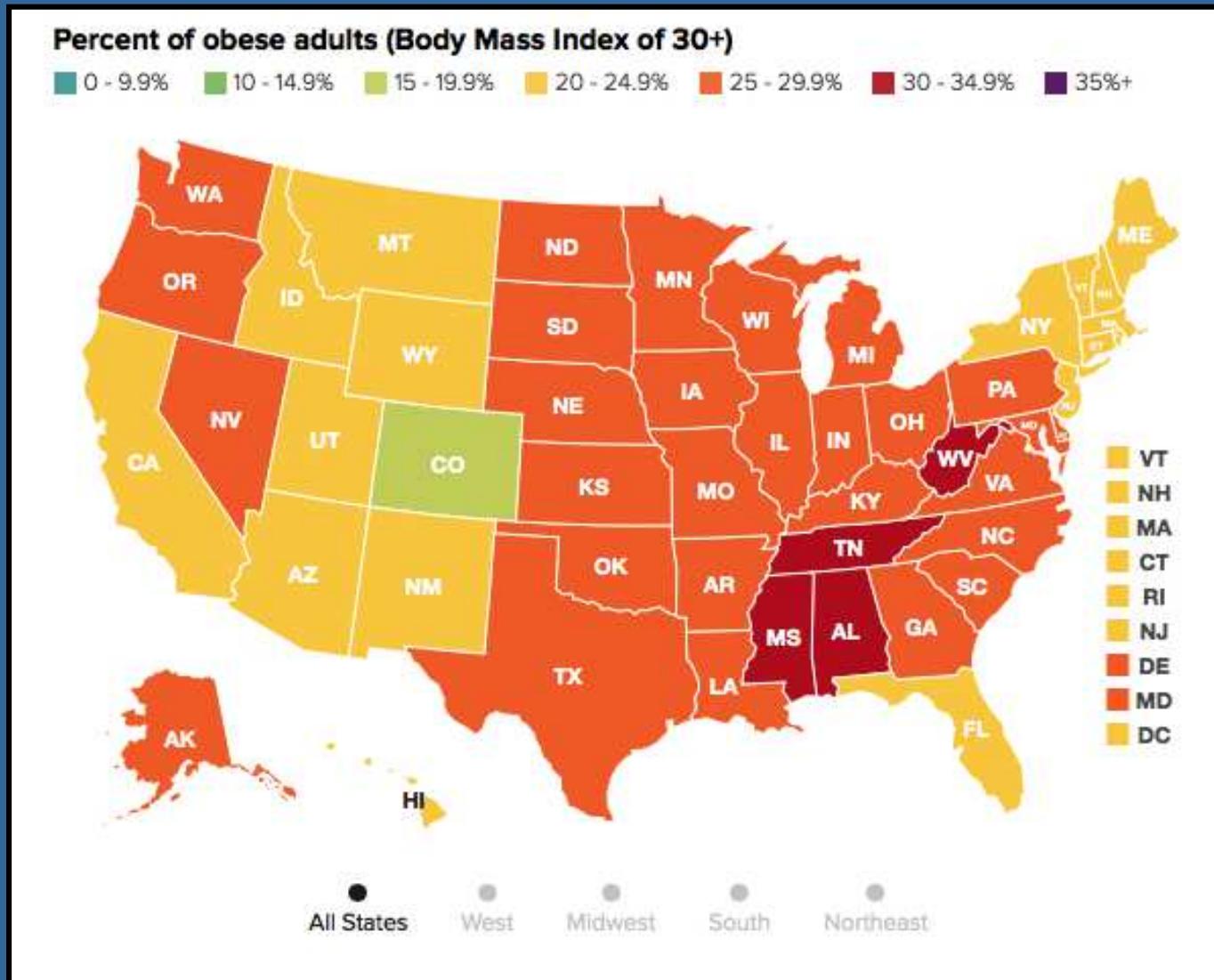
# Adult Obesity Rate by State, 2006



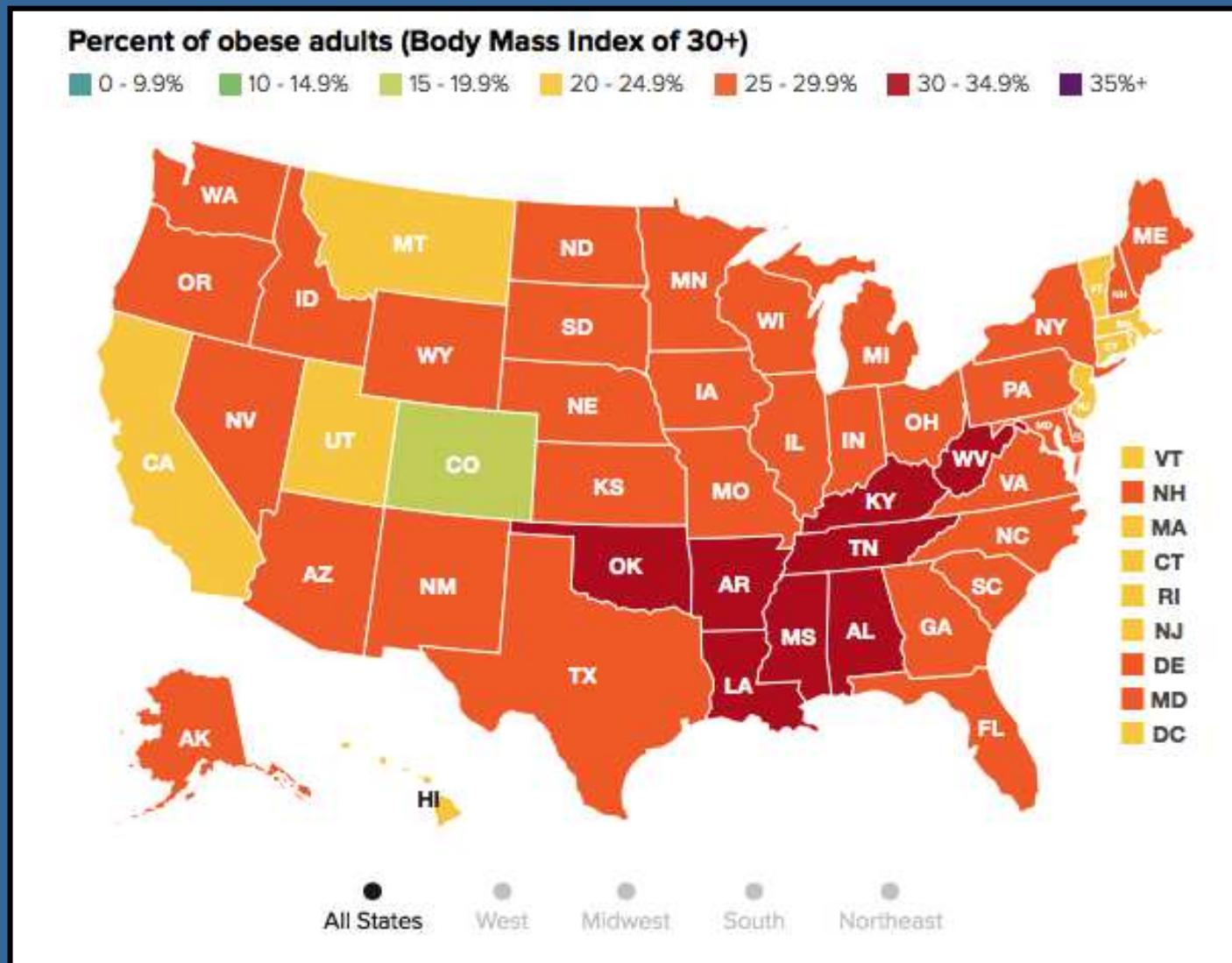
# Adult Obesity Rate by State, 2007



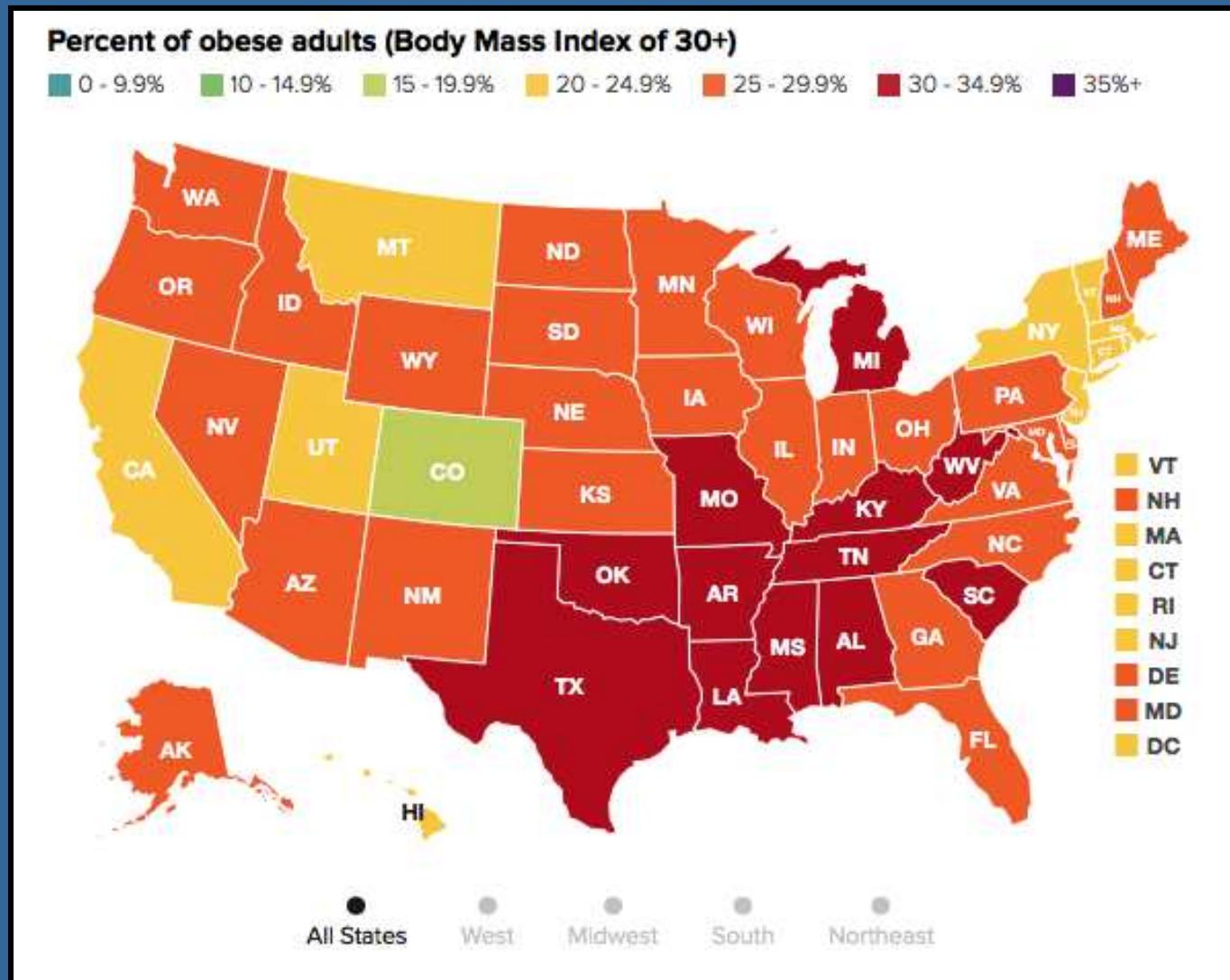
# Adult Obesity Rate by State, 2008



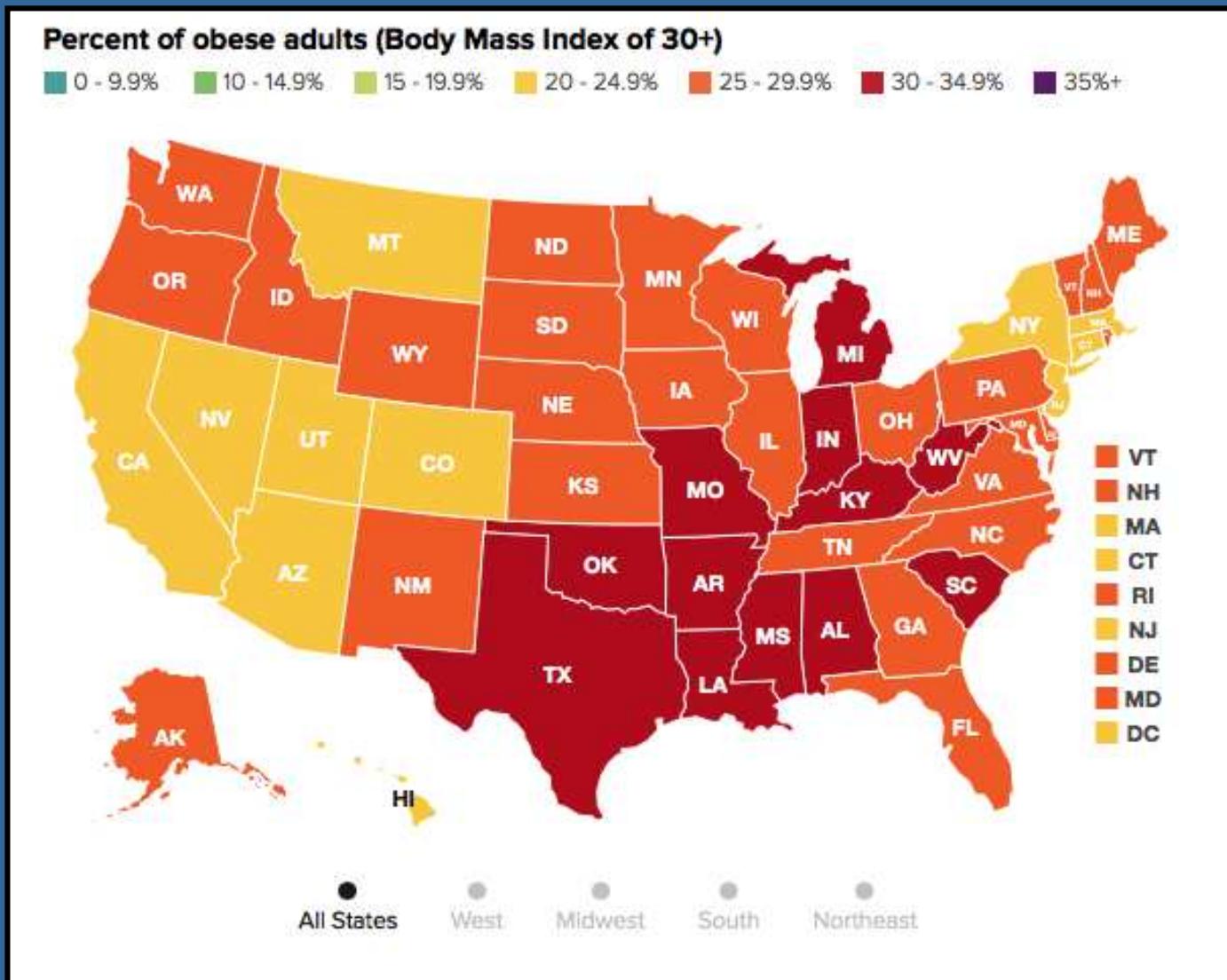
# Adult Obesity Rate by State, 2009



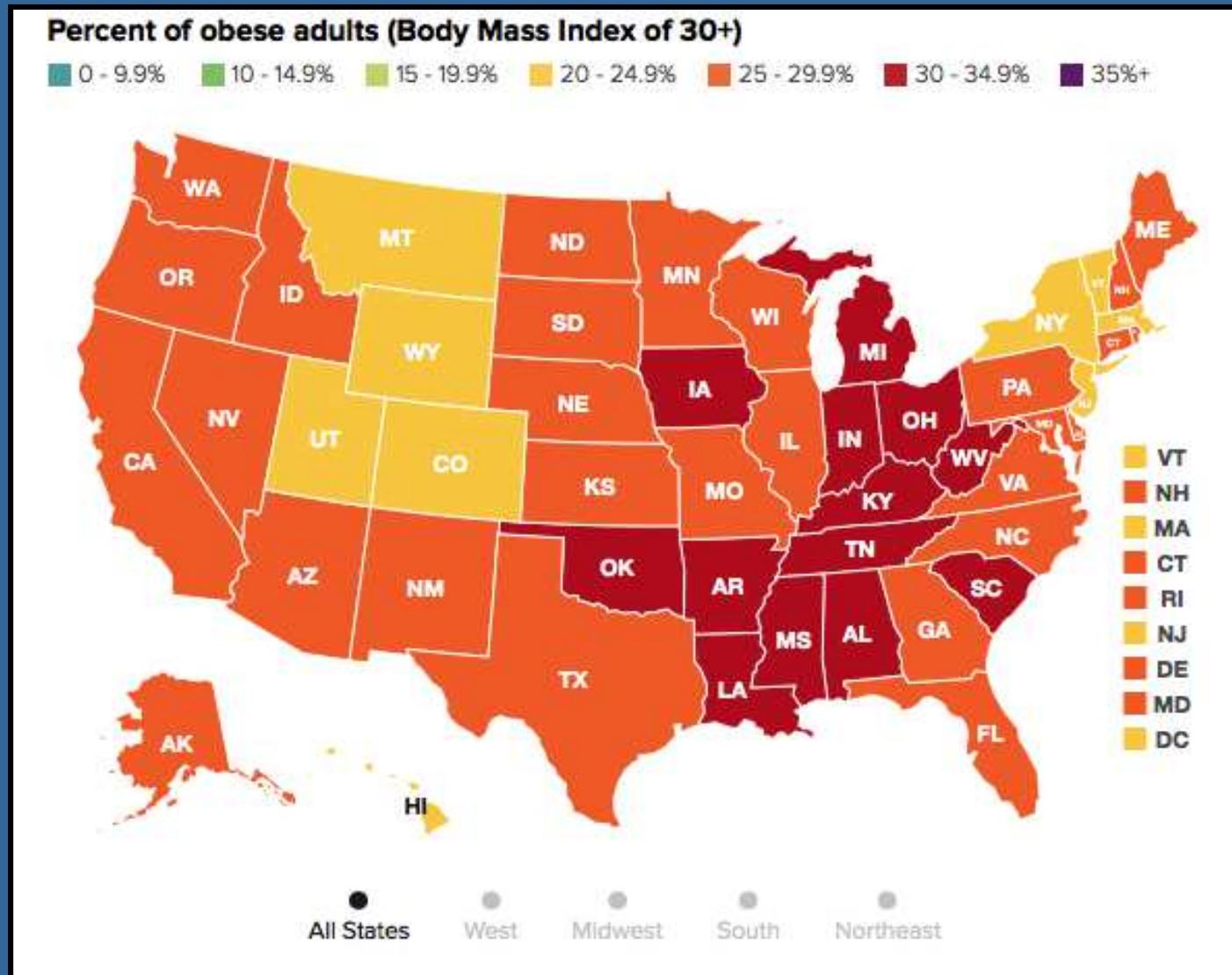
# Adult Obesity Rate by State, 2010



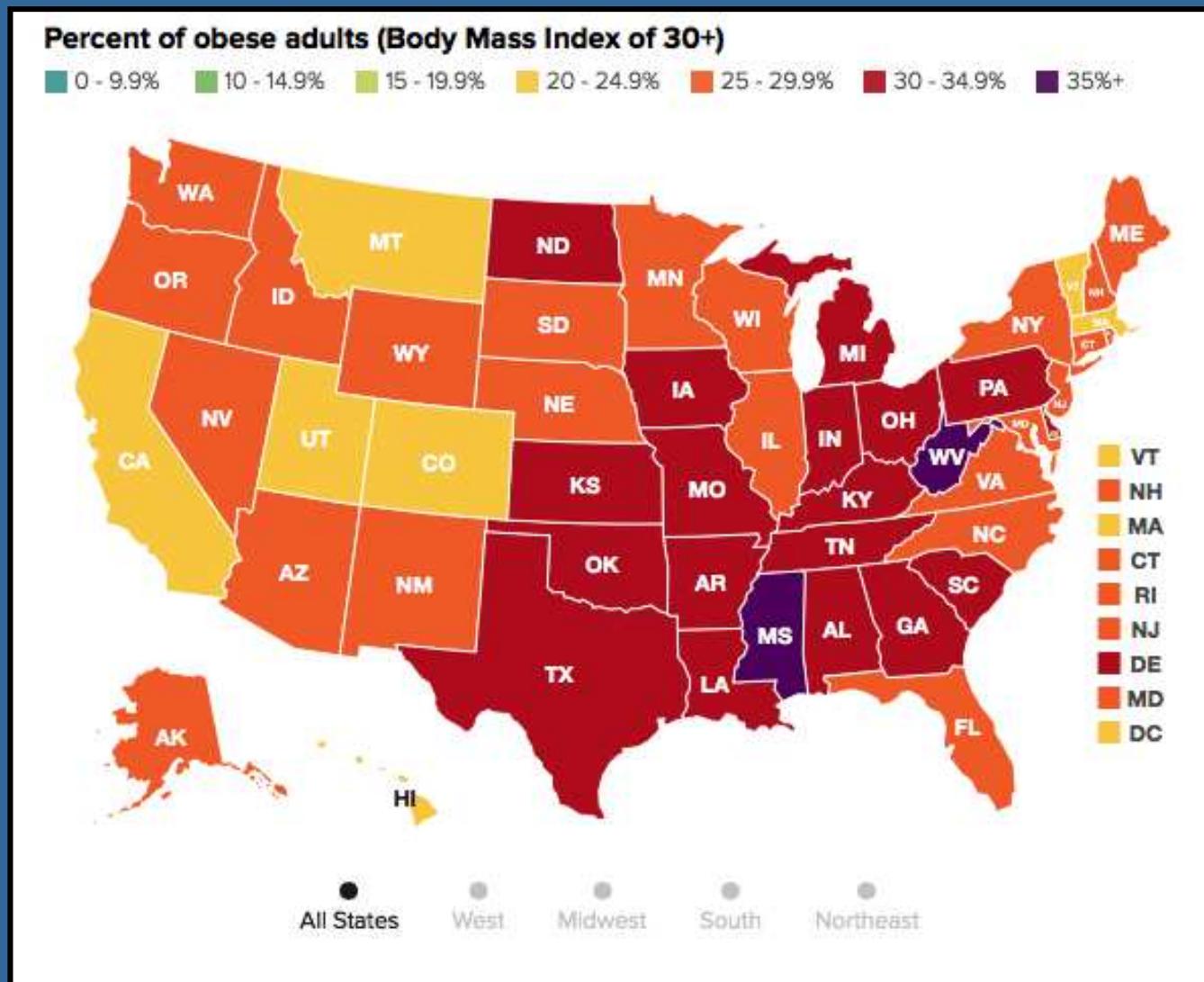
# Adult Obesity Rate by State, 2011



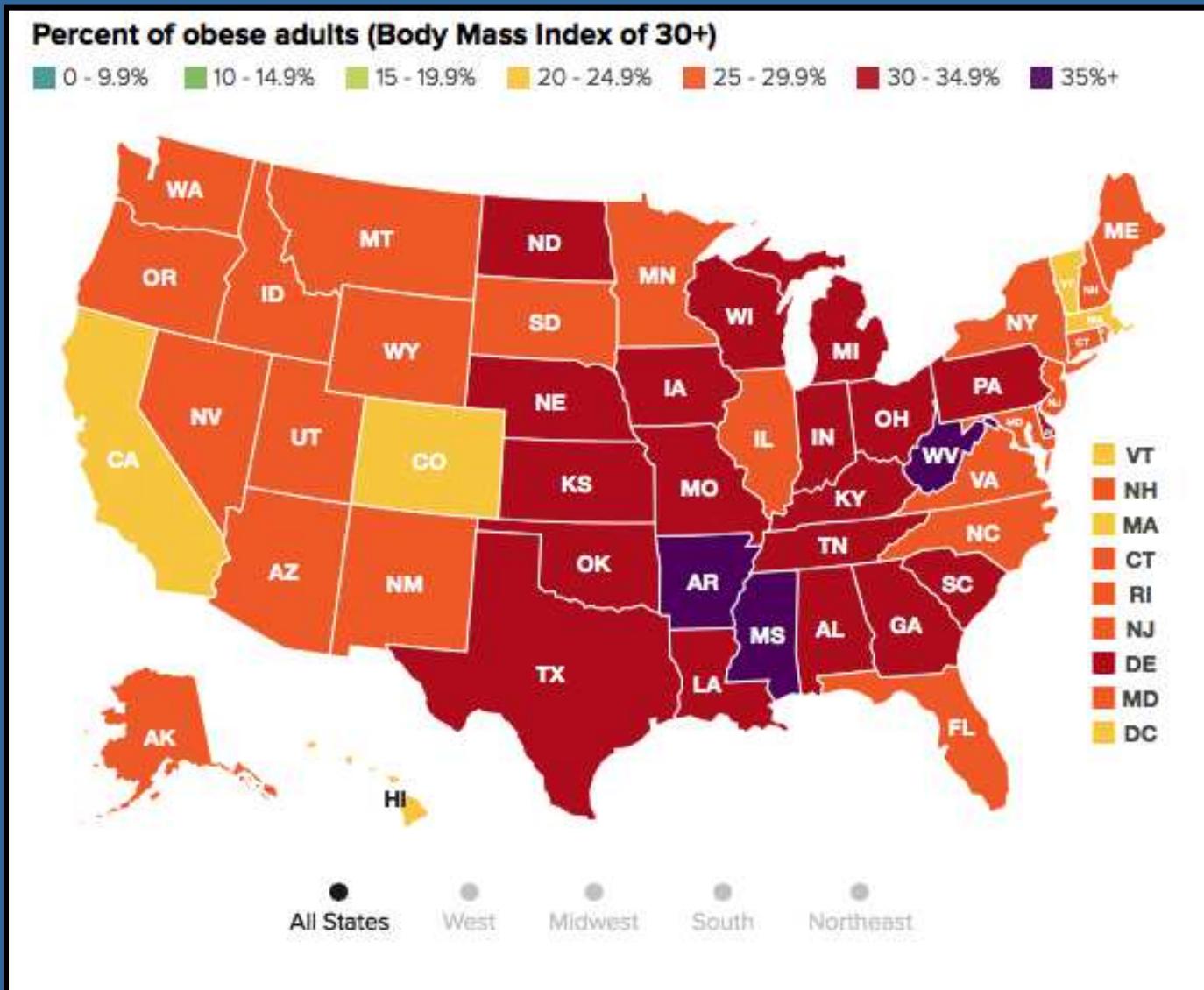
# Adult Obesity Rate by State, 2012



# Adult Obesity Rate by State, 2013



# Adult Obesity Rate by State, 2014





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min 5C

Friday October 23 2015 | thetimes.co.uk | No 70736

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## Victory against the odds

How Henry V triumphed at Agincourt 600th anniversary pullout



## Bricks & Mortar

Where to buy if you want to commute

# Act now on junk food to save our children

NHS chief calls for action after sugar tax row

Chris Smith Health Editor

Lucy Fother

Senior Political Correspondent

The head of the NHS warned David Cameron last night to take "compre-

At present the country eats twice as much sugar as it should.

Senior health leaders were invited in hacking the review. Simon Stevens, the chief executive of NHS England, said: "This report is a forewarning and far-reach-



# Budget 2016: Sugar tax crusader Jamie Oliver jubilant as soft drinks companies lose their fizz March 16<sup>th</sup> YESTERDAY!

with food as a generation, was finally published yesterday amid growing anger over its secrecy.

Jeremy Hunt, the health secretary, had blocked MPs from seeing the evidence, but they put pressure on him

well as the foods available and how they are produced. "We are constantly swayed towards buying and eating more food." With food better promoted and cheaper than ever before, PHE declares: "It is time to do something

Business & photo: David Cameron takes Xi Jinping for a pint at titter yesterday. China pays for Mandarin lessons, pages 32-35



# The Decline of 'Big Soda'

The drop in soda consumption represents the single largest change in the American diet in the last decade.

OCT. 2, 2015

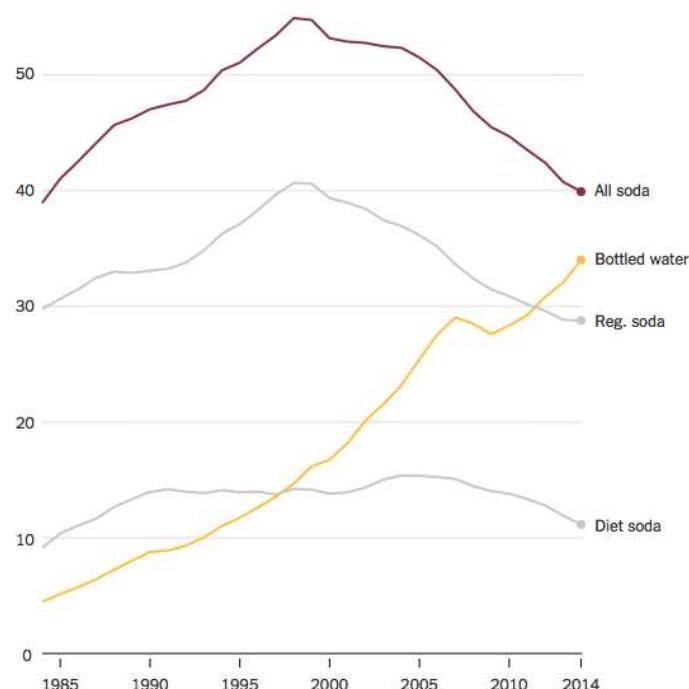


**It's No Wonder that the Cola Giants are Interested in Water and in Dairy Drinks!**



Water Is Gaining on Soda

Gallons per capita



Source: Beverage Marketing Corporation



Alexi Mostrou Special Correspondent  
Last updated at 12:01PM, October 9 2015

Coca-Cola is to publish details of all the scientific research it funds in the UK after an investigation by *The Times* uncovered that the company had spent millions of pounds to counter claims that its drinks help to cause obesity.

◀ ▶ 1 of 2

Rita Ora, one of Coca-Cola's many celebrity backers Getty Images

# Fizzy drinks giant pays millions to diet experts

Scandal as scientists deny sugar link with obesity

Alexi Mostrou Special Correspondent

Coca-Cola has poured millions of pounds into British scientific research and healthy-eating initiatives to counter claims that its drinks help

£1 million from Coca-Cola while he provided nutritional advice to leading sports bodies.

● Coke has provided financial support, sponsorship or research funding to British organisations including UKAct-

## Worst offenders for each type of flavoured hot drink per serving:



Café	Drink	Category	Sugars per serving (g)	Teaspoons of sugar per serving**
Starbucks	Hot Mulled Fruit - Grape with Chai, Orange and Cinnamon - Venti	Hot Mulled Fruit	99.0	25
Costa	Chai Latte - Massimo - Eat In	Chai Latte	79.7*	20
Starbucks	White Chocolate Mocha with Whipped Cream - Venti	White Mocha	73.8*	18
Starbucks	Signature Hot Chocolate - Venti	Hot Chocolate	60.0*	15
KFC	Mocha	Mocha	58.8*	15
Caffe Nero	Caramelatte – Drink In	Caramel Latte	50.6*	13



\* Contains some sugars (lactose) naturally occurring in the milk.

# PepsiCo's innovation imperative in a world where 'small is cool'

67

Shares



In a world where small businesses are emerging as genuine threats to larger organizations, PepsiCo's countermeasure is to focus on the experiential rather than the transactional aspects of its brands.

SCRAMBLED EGG PATTY (WHOLE EGGS, WHEY, EGG WHITES, NONFAT MILK, SOYBEAN OIL, MODIFIED FOOD STARCH, CONTAINS TWO PERCENT OR LESS OF DICALCIUM PHOSPHATE, SALT, SODIUM BICARBONATE, XANTHAN GUM, GUAR GUM, CITRIC ACID, PEPPER), MULTIGRAIN FLATBREAD (WATER, WHOLE WHEAT FLOUR, ENRICHED FLOUR [WHEAT FLOUR, MALTED BARLEY FLOUR, NIACIN, REDUCED IRON, THIAMIN MONONITRATE (VITAMIN B1), RIBOFLAVIN (VITAMIN B2), FOLIC ACID], YEAST, SUGAR, WHEAT GLUTEN, OAT FIBER, WHEAT BRAN, CONTAINS TWO PERCENT OR LESS OF MODIFIED WHEAT STARCH, VINEGAR, SOYBEAN OIL, SALT, CULTURED WHEAT FLOUR, ROLLED WHEAT, CULTURED WHEAT STARCH, RYE NUGGETS, CORN GRITS, ROLLED OATS, MONOGLYCERIDES, RYE FLAKES, SODIUM STEAROYL LACTYLATE, TRITICALE FLAKES, BROWN RICE FLOUR, MONOCALCIUM PHOSPHATE, CALCIUM SULFATE, GUAR GUM, BARLEY FLAKES, HULLED MILLET, WHOLE FLAX SEED, ENZYMES, ASCORBIC ACID, CALCIUM PROPIONATE [PRESERVATIVE]), SAUSAGE PATTY (PORK, MECHANICALLY SEPARATED TURKEY, WATER, SALT, SPICES, CORN SYRUP SOLIDS, DEXTROSE, SPICE EXTRACTIVES), PASTEURIZED PROCESS WHITE CHEDDAR CHEESE PRODUCT (CHEESE [PASTEURIZED MILK, CHEESE CULTURES, SALT, ENZYMES], WATER, CREAM, SKIM MILK, SODIUM PHOSPHATES, CASEIN, NATURAL CHEDDAR CHEESE FLAVOR [CHEDDAR CHEESE (PASTEURIZED MILK, SALT, CHEESE CULTURE, ENZYME), WATER, SODIUM PHOSPHATE, SALT, BUTTER OIL, XANTHAN GUM], SALT).



Convenient but are they consonant with consumer trends for natural, lightly processed, “clean” labels?



# Dunkin' Donuts to remove titanium dioxide from donuts



The baked goods giant says it will remove whitening agent from its powdered donuts over fears it might contain toxic nanomaterials



# Kellogg's to Remove All Artificial Ingredients from Cereals, Q2 Earnings Down

Email  Print  Share



05 Aug 2015 --- US cereals company Kellogg's has announced that it is to become the latest international food producer to cut out artificial colors and flavors from some of its range.

The announcement confirmed that 75% of its cereals in North America were already being made without artificial colors and more than half without artificial flavors but that by the end of 2018, all artificial ingredients would be removed.



# General Mills to Remove Artificial Flavors & Colors From its Cereals

Email  Print  Share



23 Jun 2015 --- US food giant General Mills cereals has joined a number of other food producers by making a commitment to remove artificial flavors and colors from artificial sources from 90% of its cereals in response to consumers' changing preferences. It plans to have more than 90 percent of the portfolio free of artificial flavors and colors by the end of 2016.



## Coca Cola Enterprises Makes 10% Full Range Calorie Reduction Pledge by 2020

Mars to ditch artificial colours from its entire global food & drink portfolio



# Taco Bell to remove artificial ingredients from most of menu

Lisa Jennings

May 26, 2015

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27

COMMENTS 0

Quick-service chain to strip artificial colors, flavors and more from food

What is in this article?

Taco Bell to remove artificial ingredients from most of menu

Appealing to vegetarians



The chain's Grilled Breakfast Burritos, from left: Sausage, Bacon and Fiesta Potato  
Taco Bell

Taco Bell Corp. pledged Tuesday to remove all artificial colors and flavors from most of its menu items, as well as certain additives, added trans fats, palm oil and high-fructose corn syrup, by the end of 2015.

The move to more natural ingredients comes in response to consumer demand, and is part of a larger effort to simplify and be more transparent about the menu, said Brian Niccol, CEO of the Irvine, Calif.-based quick-service operator.

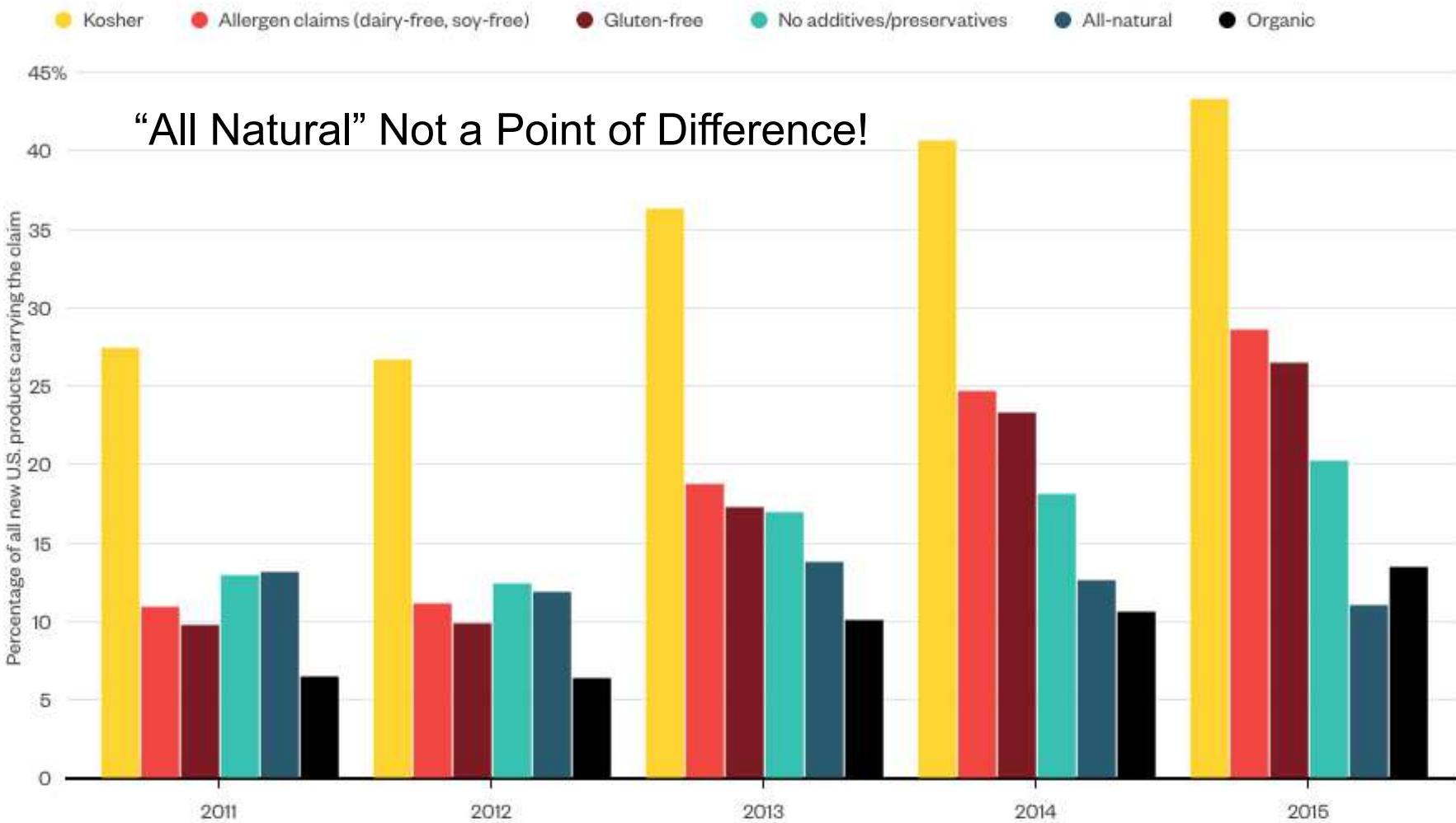
Consumers are "telling us less is más when it comes to ingredients," Niccol said.

# Food Ingredients are “Free”!



## Fine Print

Label claims on new food and drink products in the U.S.



# Consumers Want Their Meat “Free” Across the Globe! And They Want Adjectives Added and Not Additives Added!

- Antibiotic-free
- Hormone-free
- Additive-free
- Campylobacter-free
- Salmonella-free
- E.coli-free
- GMO-free
- Free-range
- Gluten-free



Contact a Salmonella Lawyer Now  
Free Case Evaluation  
**1-888-377-8900**





Clearly, the “gluten issue” is much more than a coeliac problem.



NO ONE  
EVER  
SAYS  
“MMM,  
SODIUM  
STEAROYL  
LACTYLATE.”

At Nature's Pride, we don't think you should put anything in your mouth you can't pronounce. So taste the difference natural makes.

100% NATURAL. 100% DELICIOUS.

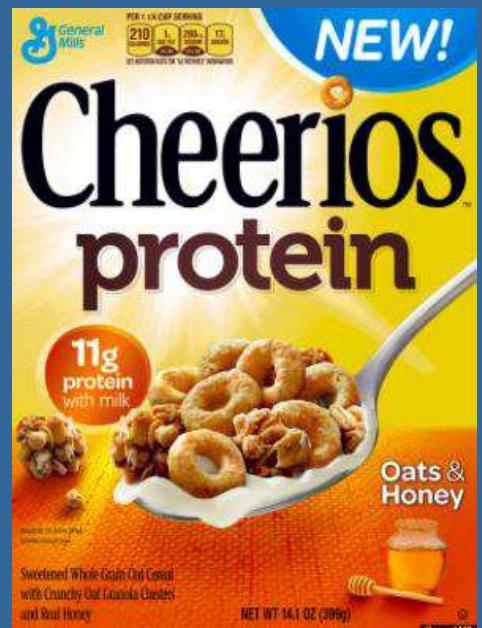
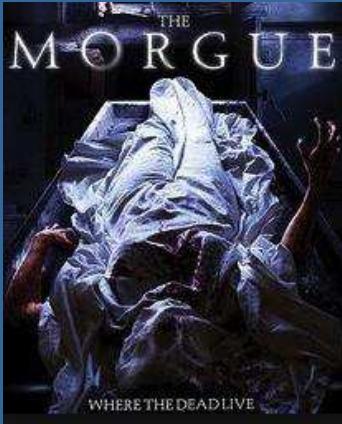
[NaturesPrideBread.com](http://NaturesPrideBread.com)



Buying Organic: General Mills Swallows Annie's For \$820 Million (4X sales)



“Big Food” Caught With Its Trousers Down?!



Imperial College London



# General Mills to reach \$1 billion in net sales from natural & organic products by 2019

Premium meat snacks business expands company's natural and organic portfolio



OUR BARS:

BISON   BEEF   CHICKEN   BACON

But, NEVER underestimate “Big Food” capacity to respond!

Imperial College London

“A GOOD BROTH WILL  
BRING BACK THE DEAD”

» ANCIENT PROVERB

SHOP NOW



OUR BARS:

BISON    BEEF    CHICKEN    BACON



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London



GENERAL MILLS

November, 2015

301 INC  
EMERGING BRAND ELEVATOR

Elevating great ideas

301 INC launches new investment fund through CircleUp to seed emerging food brands

301 INC is an energetic and enthusiastic team looking to collaborate with emerging food brands; to roll up our sleeves and work together to create breakthrough innovations and build successful businesses. If you have a product that has demonstrated success in the market, and you're ready to take it to the next level, let's elevate it.

# Transparency of Ingredients Not Without Its Challenges

e.g. Campbell's iconic tomato soup with HFCS/GM ingredients

**Campbell's**

WHAT GOES INTO OUR FOOD   HOW WE MAKE OUR FOOD   THE CHOICES BEHIND OUR FOOD   HOW WE HELP   ASK US

## *What Goes* INTO OUR FOOD

Choose a product or brand and find out what ingredients we use, how we develop recipes, the packaging we select and where the product is made.

We're just starting. We will add more products and brands over time. So if there is something you would like us to talk about get in touch.

**Get In Touch**

Red bell pepper cubes, rice, salt, celery, basil leaves, thyme sprigs, and a whole garlic bulb are scattered around the central text area.



*Eat 'em like junk food" works  
well for any snacking produce*

**Campbell's**



Cold-Pressed Fruit & Vegetable Juices:  
Strong Growth Potential with Excellent  
Health & well-Being Hooks



Campbell Soup Splashes into Cold-Pressed Juice  
with “1915 by Bolthouse Farms”



Cold-Pressed  
Redolent of  
EVOO

Any Room for a  
Super Ingredient  
Like Onion Juice?

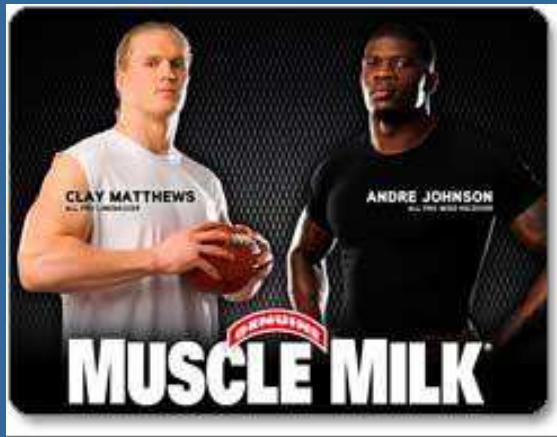


# Campbell Soup to buy salsa maker Garden Fresh for \$231 million



*Campbell's*®

# Hormel to Acquire Muscle Milk Maker for \$450 Million



“Big Food” Desperate to Align with Natural-Loving Millennials!



## Hormel goes organic with latest big food acquisition

Hormel Foods is paying \$775 million to buy organic processed meats maker Applegate Farms, the latest deal by a food giant for a smaller rival in the grocery aisle.



# Niman Ranch Pork: Now Brought to You by Perdue

Perdue Farms gobble up 'humane beef' brand Niman Ranch



*Jacek Chabraszewski/Shutterstock*

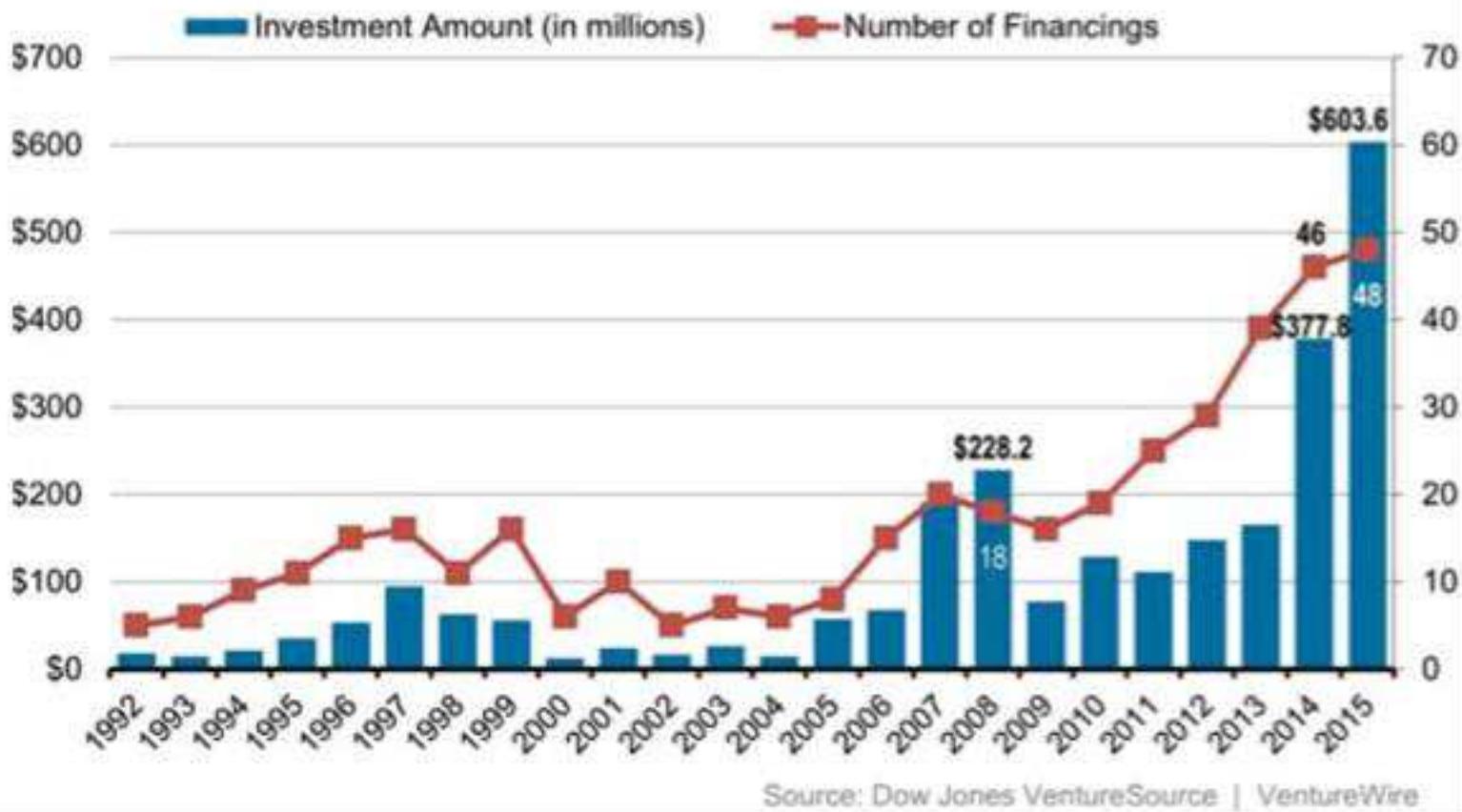
Late Tuesday afternoon, Perdue, the nation's fourth-largest chicken company, snapped up the famed niche meat producer Niman Ranch, best known for its pork grown without antibiotic or other pharmaceutical growth enhancers, and also a player in the alternative beef, lamb, and egg markets. Eschewing the vast hog factories known as CAFOs (concentrated animal feeding operations), Niman requires that its hogs "must be raised on pasture or in bedded pens."



September, 2015

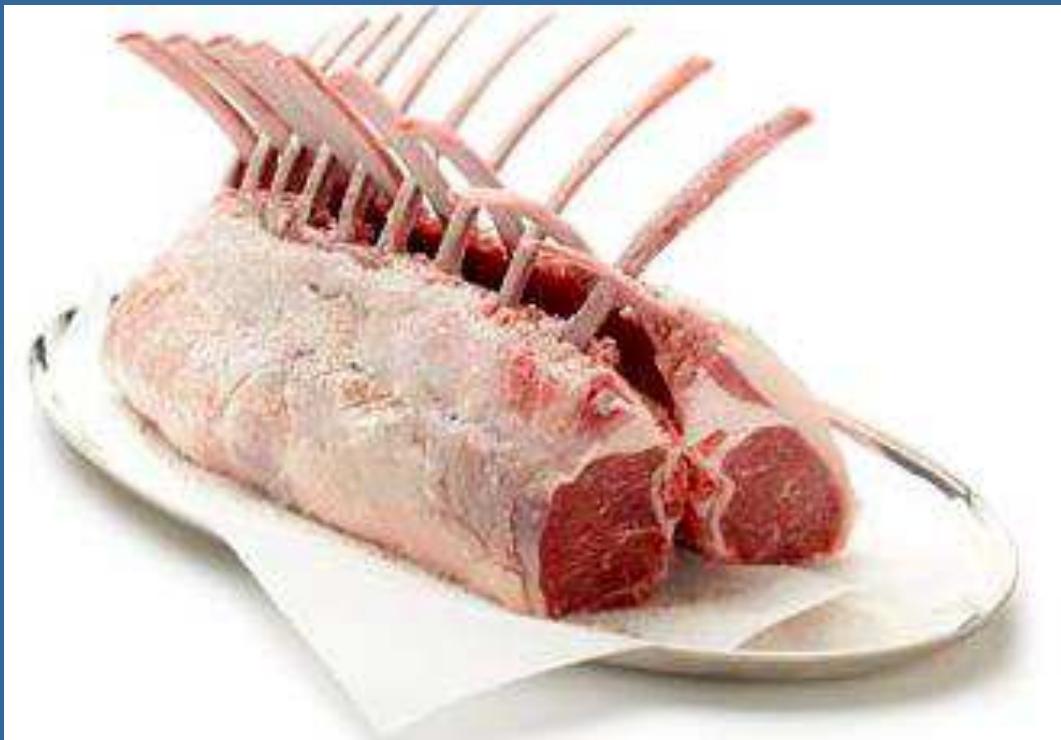
## VC Investment in Food, Beverage Companies Soars

Investment in U.S.-based, venture-backed companies





# Ingredients: New Zealand Lamb



- but what breed?
- from where?
- how produced?
- by whom?
- farm history?
- .....
- Add consumer-relevant adjectives

# MEET THE PRODUCERS

Experts from around Britain who help us bring 100s of fresh ideas to your table

ENGLAND



STRAWBERRIES | MARION REGAN

*Awarded an MBE for her services  
to the fruit industry*

SCOTLAND



ORKNEY CRAB | RONNIE NORQUOY

*Fishing for 40 years and helping  
us source sustainable crab from  
the wild Atlantic seas*

WALES



WELSH CAKES | ROBIN JONES

*All our Welsh cakes are hand-  
turned in the bakery*

IRELAND



POTATOES | MICHAEL MCKILLOP

*Plants new varieties every season in  
nutrient-rich soil for delicious  
potatoes full of goodness*

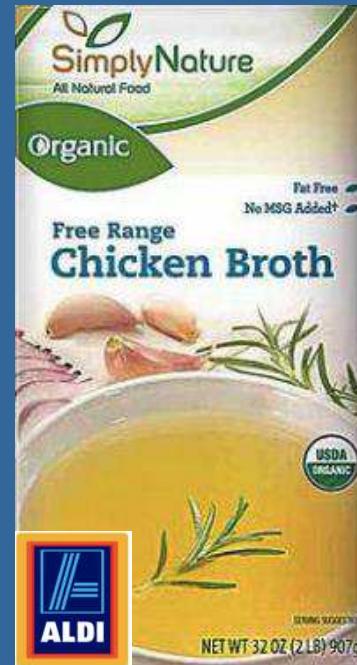


**“How’d You Like Your Meat?”**

**“With Adjectives, Please”:**

- **known provenance ...**
- **Dugdale Farm ....**
- **Gloucester Old Spot ..**
- **grass-fed, suckler ...**
- **vegetarian diet ...**
- **organic ....**
- **new season ...**
- **free range**
- **single estate**
- **free-from**
- **happy ...**
- **environmentally-friendly ...**

# Huge Trend to Few, Simple, Natural Ingredients Positive for Farmers Worldwide



Hershey and Nestle Switch To Natural Ingredients

**Mars to ditch all artificial colours from its entire global food portfolio**





Philippines' Monde Nissin buys out UK food firm Quorn for \$831m



Imperial College London

# Impossible Foods Raises a Whopping \$108 Million For Its Plant-Based Burgers (October, 2015)

IMPOSSIBLE

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Backed by Well-Heeled Investors



MADE FROM PLANTS!

## THE IMPOSSIBLE CHEESEBURGER

We love meat. We love cheese. And for thousands of years we have relied on animals to make them. Impossible Foods has found a better way. We use plants to make the best meats and cheeses you'll ever eat.

Photos



## In praise of almond-milk ice cream



Almond Milk (Water, Almonds), Liquid Sugar (Sugar, Water), Coconut Oil, Sugar, Walnuts, Bananas, Corn Syrup Solids, Dried Cane Syrup, Cocoa, Pea Protein, Sunflower Lecithin, Lemon Juice Concentrate, Soy Lecithin, Vanilla Extract, Guar Gum, Natural Flavor (Coconut), Locust Bean Gum.

# 7-Eleven Stores Will Switch Exclusively to Plant-Based Just Mayo



Dr. Food  
@ProfDavidHughes



Nov 2014 Unilever sue Hampton Creek for eggless mayo. Feb 2016 Unilever launch eggless mayo. Big Food on the run; plant-based food on the up



Plant-Based Egg and Meat Analogues Have Market Traction

# Vegetarians have much lower sperm counts

A diet rich in fruit and vegetables may harm fertility, say researchers at Loma Linda University Medical School



---

By Sarah Knapton, Science Editor, at the ASRM conference in Hawaii

5:00AM BST 20 Oct 2014

 Print this article

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# Top Global Trends Food & Beverages in 2015



- Clean and clear labels (ingredients)
- Convenience for foodies
- Marketing to millennials (tech savvy/socially-engaged)
- Snackification ... of everything!
- Good fats, good carbs
- Protein boom but much more than meat
- More for fruit & veg. (drinks/natural ingredients, etc.)
- Freshly frozen (renaissance driven by smoothies)
- Private label progresses with more sophistication
- Rich, chewy and crunchy – texture and indulgence

# Millennials (20-35 year olds) are Prime Targets

- they're global – been abroad, friends abroad, and frequently buy products from abroad
- educated middle class very similar across the globe
- connected – the 1<sup>st</sup> native digital generation. 90% have smart phones and in constant use
- social on-line and off-line – seek friends' advice/respect – quick to criticise and compliment
- hungry for experiences, more adventuresome, prefer smaller businesses, sceptical of mega-corporations
- impulse shoppers & have no patience (want it NOW!)
- savvy shoppers – weigh up value and values

# Increasing Complexity Driving Product Purchasing Behaviour



Including:

- savvy shopping
- local/national
  - place of production
  - care of local economy
  - local is fresh/healthier
- provenance
- heritage
- sustainability
- animal welfare
- worker welfare



As a global nutrition company Glanbia is perfectly positioned to take advantage of four key consumer megatrends that are reshaping peoples purchasing decisions about what they eat and drink. These consumer megatrends are;

- Health and Wellness.
- Active Lifestyles.
- Easy, Convenient & On the Go.
- Clean Labelling.



**Provides a Good  
Short hand of  
Global Trends**

# Values: For Shoppers, It's Not ONLY about Price



PRICE



PROMOTIONS



ETHICS



SUSTAINABILITY

VALUE



VALUES



PACK SIZE



PERFORMANCE



PROVENANCE



HERITAGE

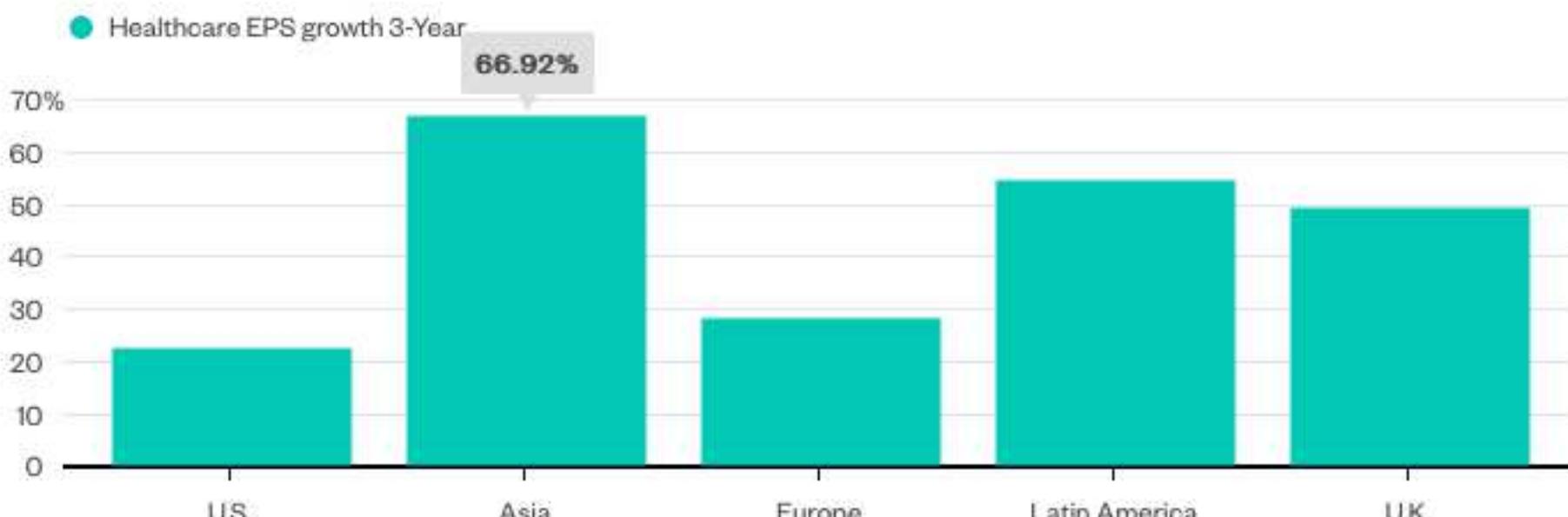
# World Population: Who's Going Up and Who's Going Down?

	2010	2030	2050
	- billion -		
World	6.9	8.2	9.0
Africa	1.0	1.5	2.0
Asia	4.1	4.8	5.1
Europe	0.7	0.7	0.7
LAC*	0.6	0.7	0.8
North America	0.3	0.4	0.5
Oceania	0.04	0.04	0.05

\*Latin America & Caribbean

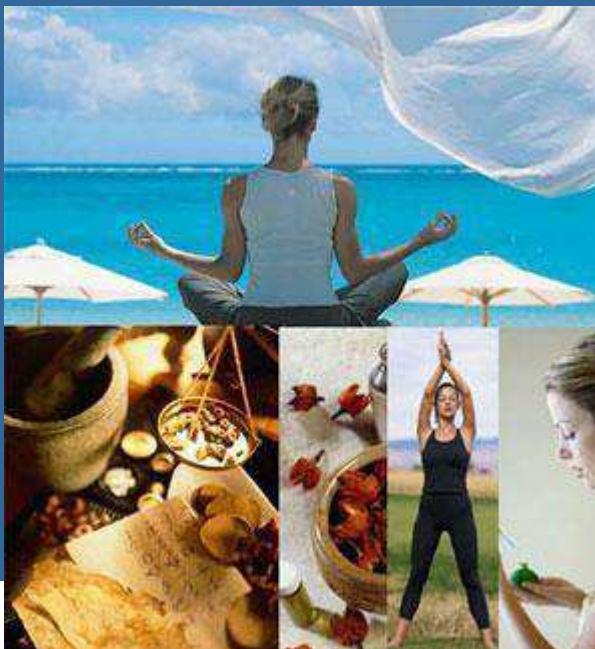
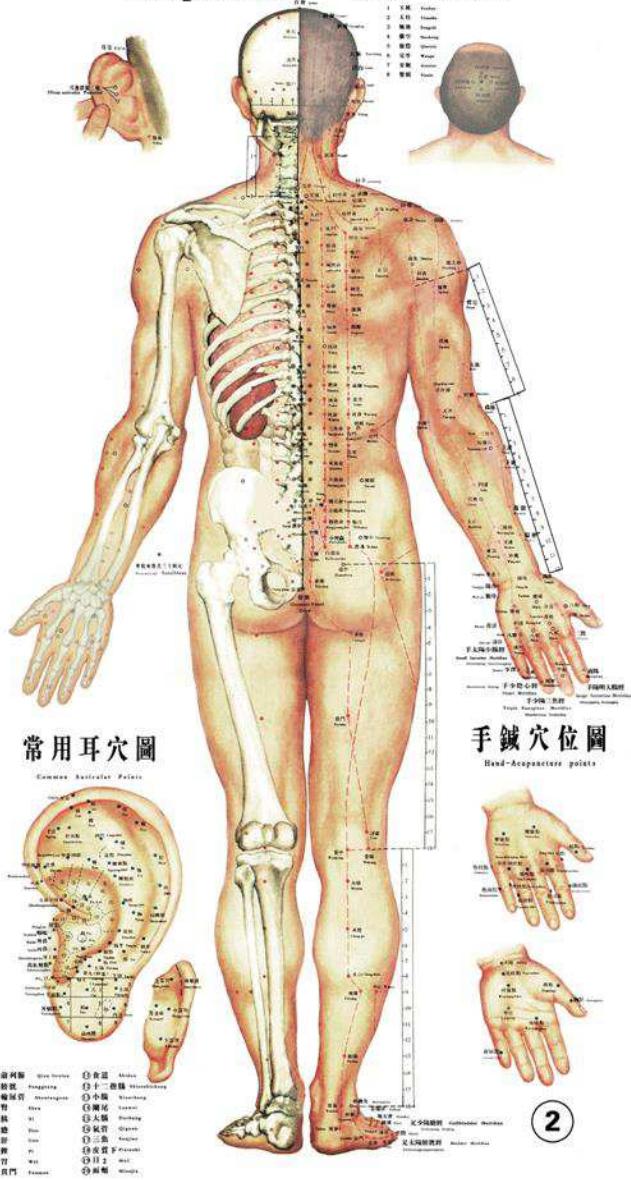
Source: UN (population scenario planning)

# Global Performance of Health Care Stocks, 2012 to 2015



Source: Bloomberg

# 鍼灸穴位掛圖 Acupuncture Wall Chart



# Perception of NZ Food and Health Product

古德奈孩子 03-10 20:02  
原生态，绿色健康 90后

代谢就是代谢的代谢 03-10 18:07  
90后 环境好东西应该也差不多吧 有能力会试试

DoubleSeven27 03-10 20:39  
90后。第一感觉：健康，安全放心。尝试过乳制品，与国内的相比，更喜欢新西兰的。未来的购买倾向：乳制品和水果，我都比较倾向于从新西兰购买。经验有限，至今还没有碰到过新西兰食品不好的情况。

小步爱水浴 03-11 01:16  
80, 第一感觉就是品质可以放心，缺点就是肉不放心有腥味比较郁闷

Mireyaaaa 03-10 20:52  
第一感觉是品质好，其次是售后好，我在countdown买过过期牛奶，之后退换不仅退钱还赔偿了我一个，国内根本不可能发生嘛。未来还是选择绿色有机类东西

80后：买了婴幼儿奶粉，成人奶粉和保健品，都很放心。国内虽然有很多超市已经有许多进口奶粉了，价格却比新西兰贵很多很多，而且有家里人喝过也觉得和新西兰带回来的味道不完全一样。（不知道是不是心理原因），新西兰的乳制品真心是大写的放心。红酒也是，价格便宜，超市随便拿一瓶回去都觉得味道棒棒哒。

古德奈孩子 10 March 14:30  
90后：因为我身处中国无法时刻品尝到国外的食品，但我又同时很期待。中国是个有潜力的市场。新西兰将这些销售出去，并且在营销渠道上简化，减少成本，我们在一些网站上购买也不用大费

新年GOGOGO 03-10 22:17  
90后，第一感觉是绿色、质优，买过一款卡瑞特兹全脂奶粉，感觉有点喝不惯。未来想体验新西兰肉类，海鲜类，不过都是经过冷藏的，还是想去当地吃新鲜的。

Macchiato 10 March 13:56  
80后：对新西兰食品第一感觉就是质量绝对放心，所以只需要根据自己的实际需求选择性购买；在新西兰买过老师提到的所有种类，发现新西兰饮料只要是小瓶的就比同种类家庭装的要贵一些，比如可乐纯净水等等，小瓶降低些价格可能会更促进销售吧，毕竟很多人当时去超市更想买到易携带一人份的饮料。

Chandler 10 March 18:42  
1.第一感觉：奶粉乳制品红酒以及保健品的质量肯定是很不错的。2.尝试体验：2014年的时候去新西兰了一个月，牛奶确实很好喝，酸奶也比国内的要更浓稠。红酒拎回家了两瓶，家人反应味道不错，我不常喝酒也没什么评价能力。保健品也买了不少，有助于缓解眼部疲劳的保健品、钙片、鱼油、绵羊油等，我感觉绵羊油还不错，家人说其他保健品也没感觉出什么效果来（可能是于无形中提高身体素质的吧...）肉类...很实在很大块相比蔬菜还是便宜一点的...未来购买的倾向：奶粉乳制品红酒内还是会买的，保健品估计没有购买的倾向了。4.食品的不足之处：我个人的感觉是...蔬菜水果太贵啦，我还记得在countdown的半截玉米特别贵...茄子好像也很贵...（寄宿家庭晚餐给的蔬菜大概就是十几粒青豆还有几小片胡萝卜...）...（90后）

水墨SHM 03-10 17:17  
80后，安全，绿色，无添加剂，无毒无害，关键是值得信任！

Original ecology

有机 Organic

责任 Responsibility

放心 Rest Assured

绿色 Green

健康 Health

好品质 Good Quality

新鲜 Fresh

味道好 Taste Good

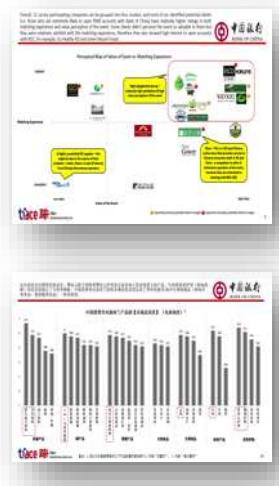
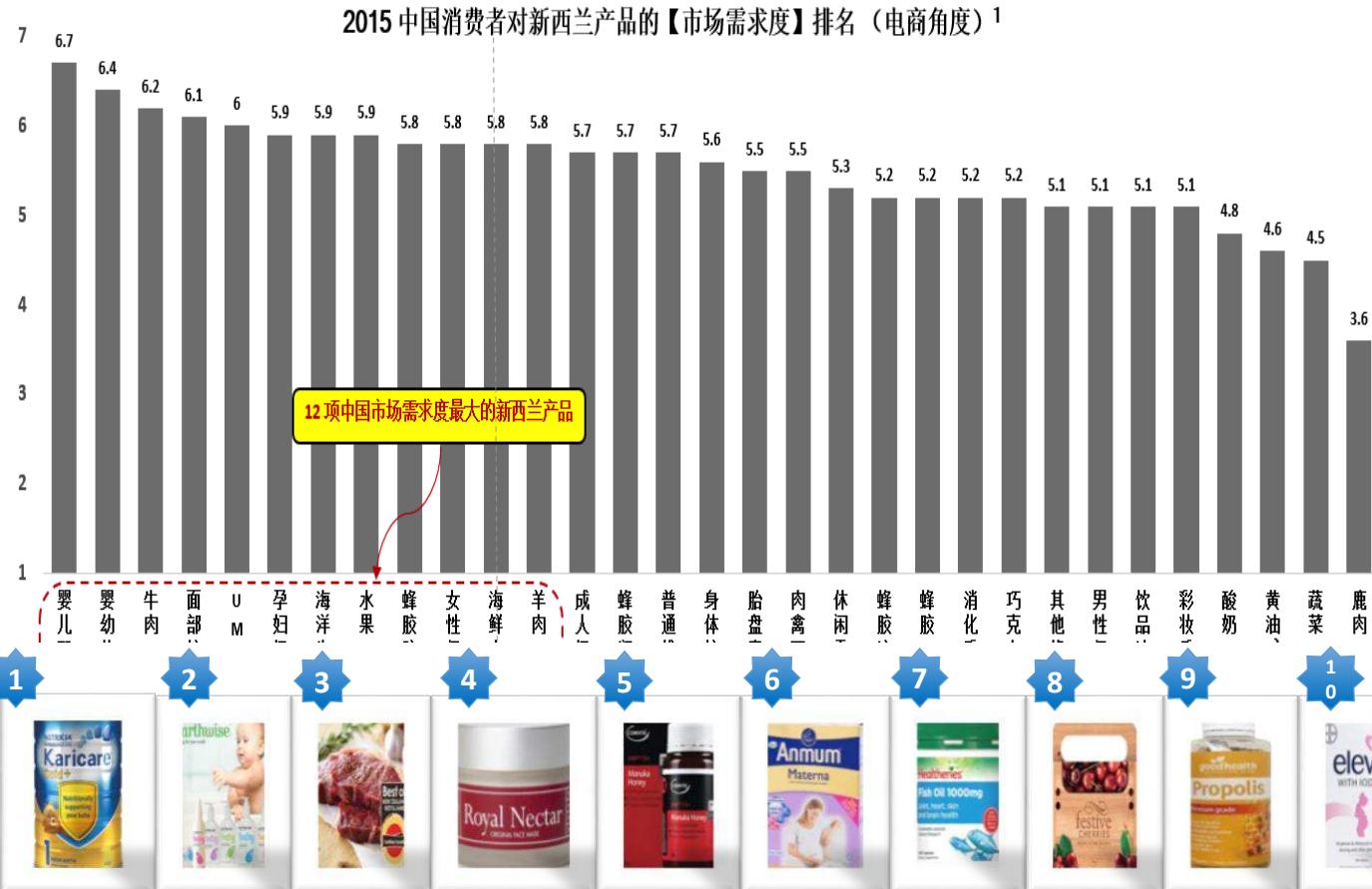
方便购买

可以接受的价格 Easily Assessed

Affordable

# NZ Product Consumption Trend in China

整体排名





OUR  
NEW PRODUCTS

N.B. BB shorthand for "Beauty Balms"

**Korea is Number 1 for Beauty Product Trends and 1<sup>st</sup> Equal with Japan for Beauty Foods**

# Natural Ingredients with Provenance Dominate

## Beauty Food for Urban Sweety



**BROCCOLI**

SKINFOOD BROCCOLI SWEET



TIME  
MAGAZINE'S  
CHOICE OF  
THE YEAR 2010

한국의 해 2010



*Viva Woman*  
cleaner greener beauty



## 12 Korean Celebrities: What Do They Eat To Keep Their Skin Looking Flawless

# Global stock markets dive on China worries

January 4<sup>th</sup> and again January 7<sup>th</sup>, 2016



## Chinese shares continue to slide

January 11<sup>th</sup>, 2016

### China growth slowest in 25 years

China's economy grew by 6.9% in 2015, compared with 7.3% a year earlier, marking its slowest growth in 25 years.

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Wall Street has continued the rout on global share markets, with the Dow Jones, S&P 500 and Nasdaq indexes all opening more than 2% down.



**David Hughes** @P...   
Global economy grew 2.6% last 12 months (European contribution -ve).  
China accounted for 47% of total.  
What if China stops growing?  
Aaaaagh!

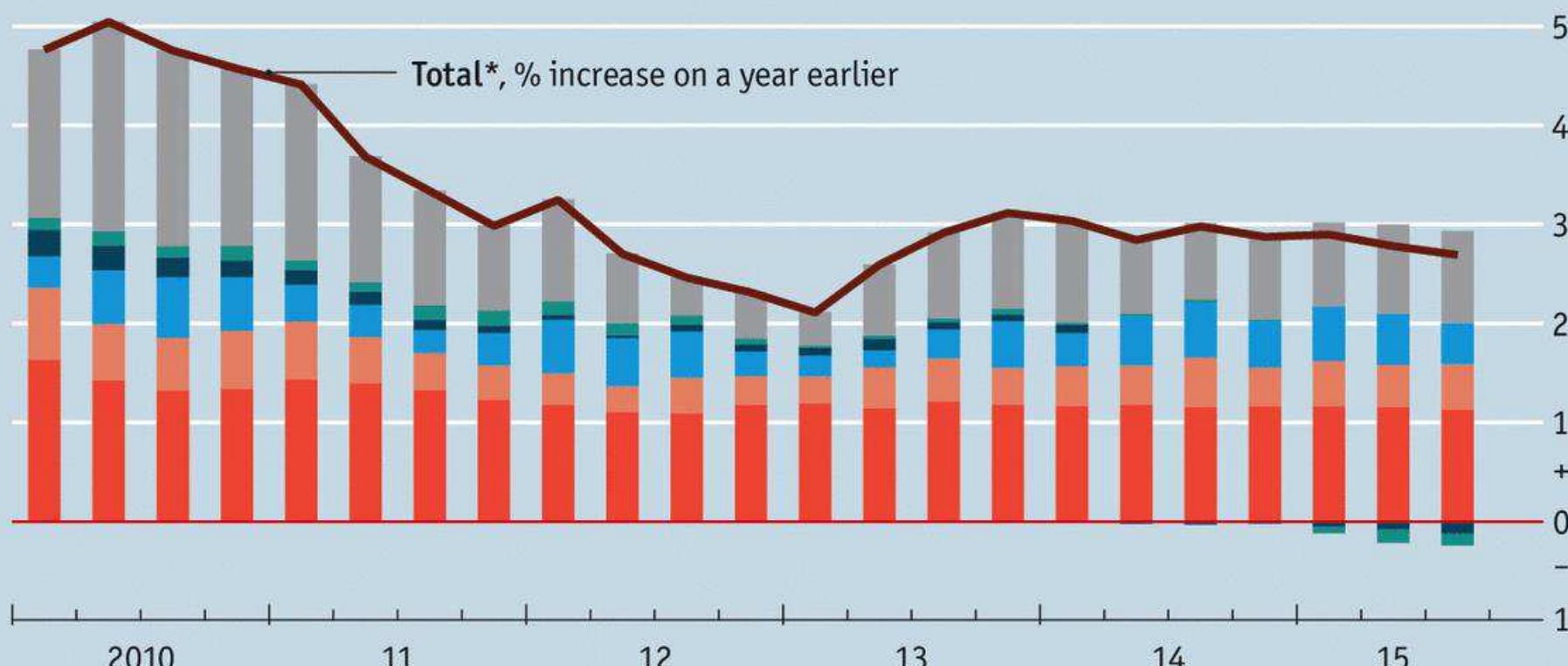
Reflective Tweet  
mid-2014

# Fingers Crossed that China and India Both Don't Catch a Cold!

## World GDP

Contribution to growth, percentage points

China India United States Brazil Russia All other countries



\*Estimates based on 57 economies 90% of world GDP. Weighted GDP at purchasing-power parity

Sources: Haver Analytics; IMF; *The Economist*

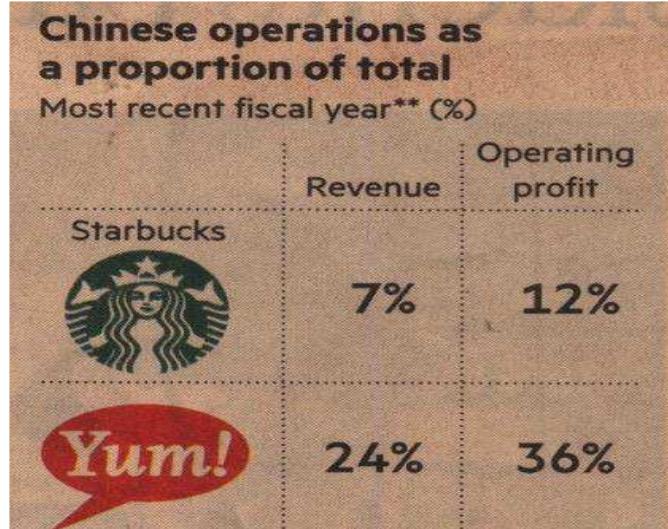
After China Meat Scandal, Troubles for OSI Reflect Broader Perils for Business

# KFC's China sales plunge on tainted food scare

By Paul R. La Monica @lamonicabuzz September 4, 2014: 9:59 AM ET



## McDonald's, KFC in China caught up in scandal over expired meat



**Bird Flu Threatens KFC's New Year Recovery**



Certified  
Origin



Brand  
Protection



In-Market  
Audits

## In The News



⌚ 15 Mar 2016

Sylvain Charlebois:  
For the food  
industry, fraud is  
the elephant in the  
room.



⌚ 16 Mar 2016

Warning about  
counterfeit GSK  
eye drops in  
Singapore



⌚ 07 Mar 2016

Police Seize 22  
Tons of Counterfeit  
Tuscan Olive Oil

[Read More](#)

# Trust, Traceability and Transparency

- Globally, consumers less trusting of government, industry, “Big” science, “Big” anything!
- Pervasive media coverage of food scandals
- Shoppers want to know much more about where their food comes from and how the animals were treated
- Most shoppers believe food companies should know “exactly” where **every** ingredient comes from
- Speed of social media communication both a blessing and a curse but, irrespective, a game changer
- Traceability and transparency in the supply chain underpins building trust with all stakeholders



**Volkswagen**



Volkswagen's emissions scandal could be far more painful for investors than BP's disastrous 2010 oil spill in the Gulf of Mexico.



100% Purity is a Tough Ask! But Excellence in Supply Chain Integrity is the Bed Rock of International Reputation for Food

# Some Concluding Thoughts:

- “Natural” is an increasingly tarnished descriptor. Guarantee of authenticity is critical – importance of proving that it’s your product or that it’s not yours!
- scientific evidence to support your health/beauty claim? Little firms must exploit power of PR! Others will make your claims (e.g. blueberries)
- consumers more patient on beauty versus health claims (for beauty, hope is never-ending!)
- Asia and particularly Korea leads on beauty foods and beauty potions – clean/simple/few ingredients
- Chinese quality issues will diminish (e.g. Japan cars)
- up social media skills to recruit millennial advocates



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Retail Blog: [www.supermarketsinyourpocket.com](http://www.supermarketsinyourpocket.com)

