Unlocking the Food Value Chain: Australian Food Industry Transformation for ASEAN Markets

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There are more people living inside this circle than outside of it.
Mining Boom to Dining Boom…

Or…

The Delicatessen to Asia!
West is Not East!
The need for insights

- Over 2600 unique cultural consumer segments across Asia*
- China is more culturally/linguistically, religiously and genetically diverse than the EU*

Culture Really Matters!!!
Food is Daily Therapy

Chinese food therapy
The Evening Meal… a Time to Connect
Food is Shared

Festival Meals (especially Chinese New Year) are key sharing moments in the Chinese calendar. Gathering time & sharing time.

In restaurants, people don’t order for themselves.

Even snacking is predominantly a shared occasion...

For example, most potato chip products are made for sharing.
Food Scandals are a regular occurrence
Purchasing fresh and packaged food online is common.

### What products have you purchased online in the past 3 months?

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Purchased in past 3 months (%)</th>
<th>Average annual (1000) spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large appliances</td>
<td>13</td>
<td>¥1.88</td>
</tr>
<tr>
<td>Luxury</td>
<td>3</td>
<td>¥1.25</td>
</tr>
<tr>
<td>Insurance</td>
<td>7</td>
<td>¥0.68</td>
</tr>
<tr>
<td>Small appliances</td>
<td>29</td>
<td>4</td>
</tr>
<tr>
<td>Consumer electronics</td>
<td>29</td>
<td>4</td>
</tr>
<tr>
<td>Travel products</td>
<td>21</td>
<td>7</td>
</tr>
<tr>
<td>Skin care &amp; cosmetics</td>
<td>37</td>
<td>18</td>
</tr>
<tr>
<td>Books &amp; A/V</td>
<td>26</td>
<td>18</td>
</tr>
<tr>
<td>Household care products</td>
<td>27</td>
<td>19</td>
</tr>
<tr>
<td>Apparel</td>
<td>66</td>
<td>22</td>
</tr>
<tr>
<td>Mom &amp; baby products</td>
<td>10</td>
<td>23</td>
</tr>
<tr>
<td>Fresh food</td>
<td>14</td>
<td>24</td>
</tr>
<tr>
<td>E-tickets</td>
<td>21</td>
<td>25</td>
</tr>
<tr>
<td>Games</td>
<td>9</td>
<td>40</td>
</tr>
<tr>
<td>Packaged food</td>
<td>34</td>
<td>34</td>
</tr>
</tbody>
</table>

Source: McKinsey Consumer China 201
Clean & Green is not enough… Premium Products Need to be Uniquely Australian

CONSUMER INSIGHTS

DEVELOPING DEEP INSIGHTS INTO THE AISAN CONSUMER RESEARCH FOCUSED ON:

- COUNTRY OF ORIGIN VS PROVENANCE
- GIFTING
Intellectual Property Shows how a Country Solves a Problem

**MARKET ANALYTICS**

ACCESSING AND ANALYSING IP TO DEEPEN UNDERSTANDING OF ASIAN PREMIUM MARKET TRENDS AND OPPORTUNITIES

RESEARCH FOCUSED ON:

- IP DATABASE ANALYSIS
- NOVEL USAGE OF CONSUMER INPUTS FOR UNLOCKING INVESTMENTS IN KNOWLEDGE SPACES
Premium Products have a High Level of Emotional Engagement

⭐️ SENSORY

MEASURING CONSUMER ENGAGEMENT AND BRAND/PRODUCT POSITIONING WITH ASIAN CONSUMERS

RESEARCH FOCUSED ON:

• BIOMETRIC APP DEVELOPMENT FOR EMOTION MEASUREMENT
• QUALITIATIVE ANALYSIS METHOD (QMA) ANALYSIS OF PRODUCT/PACKAGE CATEGORY CULTURAL DIFFERENCES
Premium Products Need a Holistic Supply Chain

MODELING SUPPLY CHAIN DECISIONS TO OPTIMIZE SUPPLY CHAIN DESIGN AND MAXIMIZE EXPORT RETURNS.

RESEARCH FOCUSED ON:

- MONTE CARLO TRADE OFF OF 16 ELEMENTS ACROSS SUPPLY CHAIN FOR DECISION ANALYSIS
- GUIDE FOR EXPORT READINESS
Packaging Drives an Initial Perception of Premiumness and Security

PACKAGING

FOOD SECURITY THROUGH INNOVATIVE PACKAGING

RESEARCH FOCUSED ON:

• NOVEL THERMOCROMATIC INKS
• ANTICOUNTERFEITING MAP INCLUSIVE OF ANTICOUNTERFEITING IP REVIEW AND CONSUMER IMPACT
Premium Foods need Authentic Flavours and/or Healthy Ingredients

ENCAPSULATION/EMULSION

PREMIUM PRODUCT TECHNOLOGY RESEARCH FOCUSED ON:

• FLAVOUR AND NUTRIENT ENHANCEMENT OF CONFECTIONARY MODEL SYSTEMS
Help SME’s Consider the Opportunity

🎵 SME ENGAGEMENT

REPORTS AND WORKSHOPS FOR EXPORT TO ASIA
