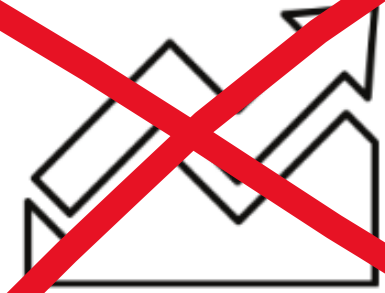


Disrupters change everything...permanently



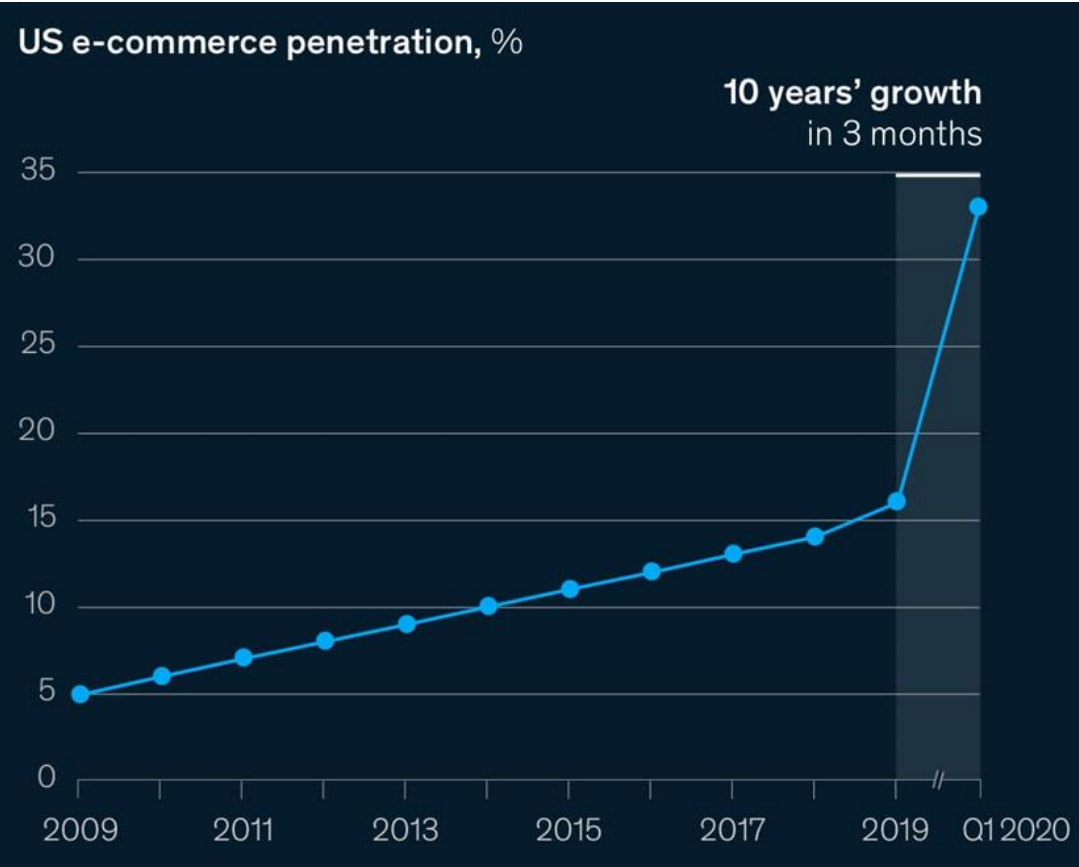
UBER



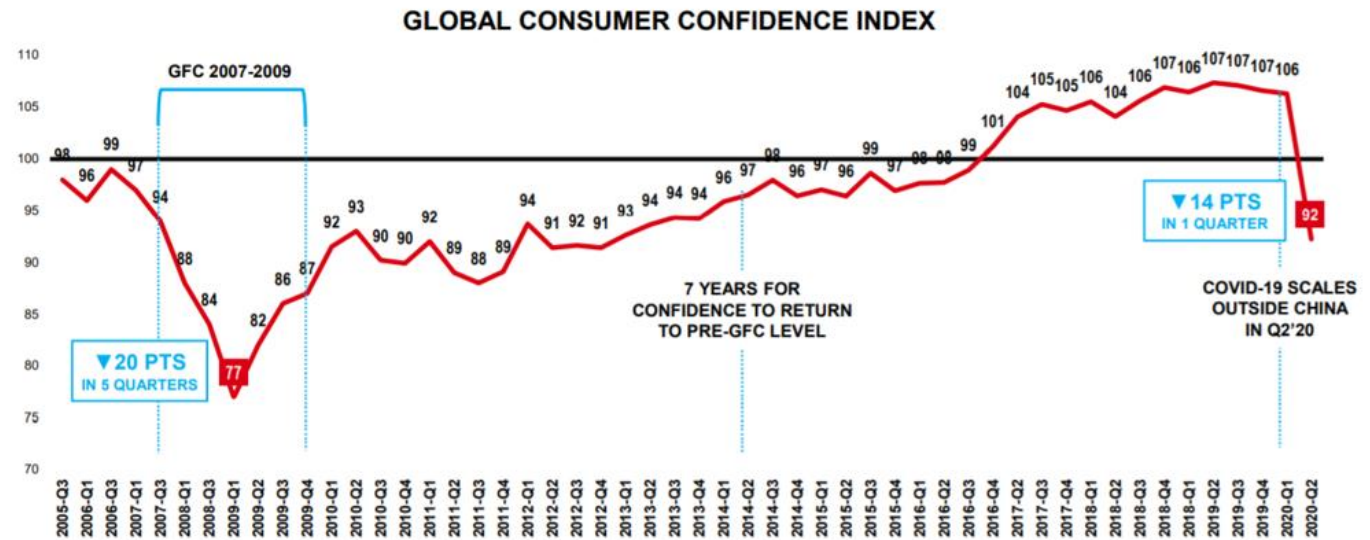
airbnb



COVID19 has changed shopper & consumer behaviour



The number of US HH purchasing online has doubled in the first quarter. This behaviour will continue to accelerate in the next phase of economic re-calibration



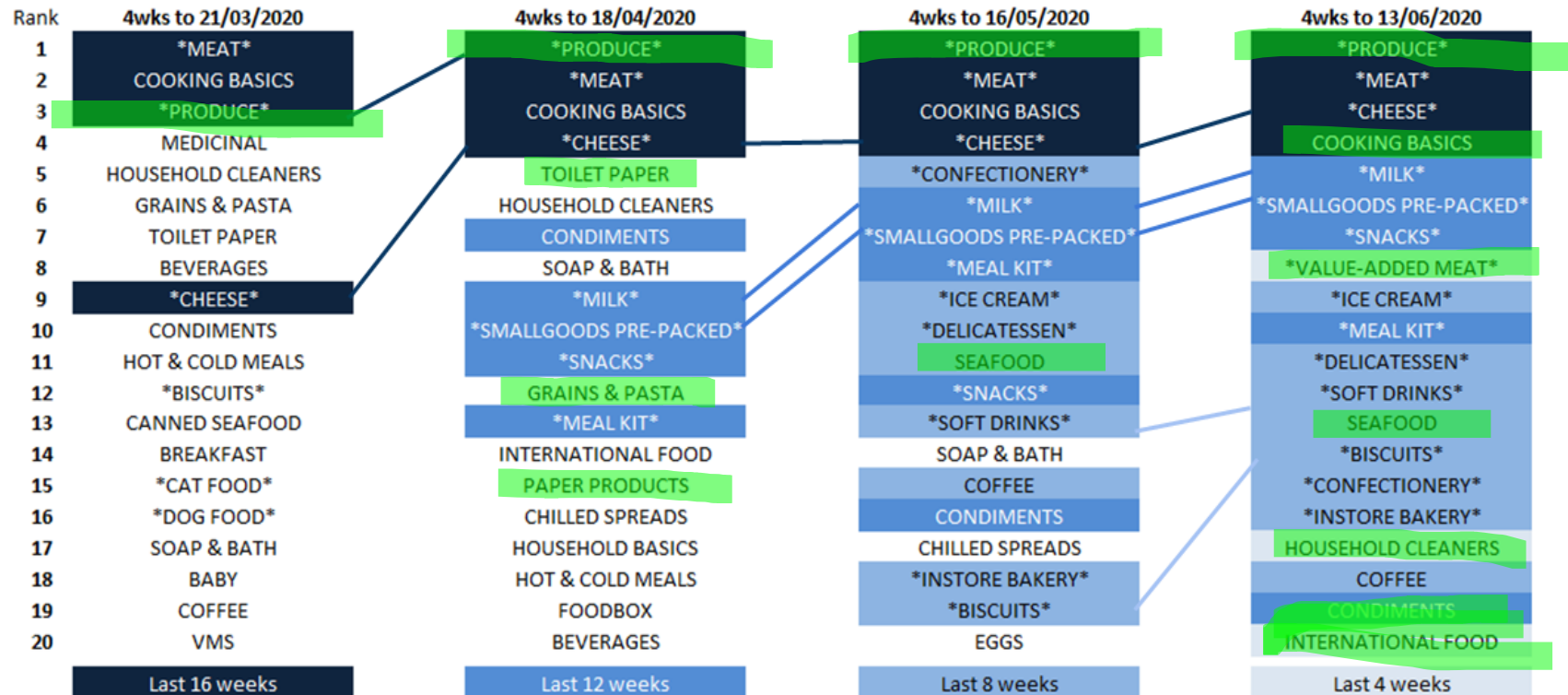
Global consumer confidence slipped more than 20bps through 5 QTRs over the GFC & then took more than 7 years to recover. In Q1 of this year confidence has dropped 14bps & this is nowhere near over

Shoppers purchase behaviour has changed significantly

HIGH GROWTH RATES ARE IN THE FRESH AND COOKING BASICS;
SPACE INDULGENCE IS ON ITS WAY BACK

n

Top 20 Absolute Value Growth categories vs YA | Total Australia



Categories between ** were in top 20 in FY 2019 vs YA

Source: Nielsen Homescan

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Consumer behaviour has changed globally...for the long term

There are as many trends & behavioural traits identified in the past 3 months as there are consumer agencies, but they all align to a basic set of 5 key tenets



Shift to Value & Essentials

Consumers have become more aware of & responsive to value; actual & perceived. There is an increase in essentials consumption along with new essentials



Shift to Digital gathers pace

10 years of growth in 1 QTR



Shock to loyalty

Brands have come under increased scrutiny as consumers become more focused on what those brands represent



Health & Caring Economy

My & my families health is the most important driver of consumer behaviour. What is in my food, where does it come from & how was it made?



The Homebody economy

Doing more at home & having a better quality of shared home life is driving more consumer & consumption decisions. Home is my sanctuary & where I & my family are safe

~~yesterday~~

There is no going back

The world has changed, shoppers have changed & consumption has changed. Basing your business recovery on “getting back to normal” is not a plan

So what?



Fresh & Clean will never have a bigger advantage

Concerns about provenance have never been higher, intention to eat healthily has never been higher. Utilise every aspect that comes from your natural advantages to secure new markets



Innovate

Bring your ideas to market now;

- The Tasmanian Fresh Produce box, delivered globally
- The Immunity mix frozen juice pack
- Couple with McKenzie & make a soup mix combo
- Home detox packs
- Powdered freeze dry packs

There will never be a better time to innovate, don't let perfect be an enemy of good