

F& GA18

FOOD & GROCERY AUSTRALIA

May 22-24, 2018
Melbourne



AUSTRALIAN FOOD & GROCERY COUNCIL

PROGRAM

TUESDAY MAY 22

4.00pm - 6.00pm **Registration**
Pre-Function, Conference Floor

6.00pm - 7.30pm **Food and Grocery Australia Welcome Reception**
The Residence, Conference Floor

WEDNESDAY MAY 23

7.30am **Registration**
Pre-Function, Conference Floor

Savoy Ballroom

9.00am **Food and Grocery Australia Conference Opening**
Clive Stiff
Chairman, Australian Food and Grocery Council
Chairman and CEO, Unilever Australia and New Zealand

Conference Plenary Session 1

9.10am **The evolution of the Australian shopper: How Woolworths is addressing the changing needs of the customer**
Claire Peters, Managing Director Supermarkets, Woolworths

Claire Peters joined Woolworths as Managing Director of their supermarkets business almost 12 months ago following an international career in retail spanning the United Kingdom and Asia. Claire will outline the changes the supermarket has seen in customer trends in Australia over the last year and how Woolworths plans to stay ahead of the customers evolving needs and expectations.

9.40am **Amazon's food and grocery strategy: Learnings from the US & EU**
Daniel Lucht, Research Director, ResearchFarm

Daniel will discuss global trends in food and grocery, Amazon and Amazon Fresh's strategy in food, the Whole Foods acquisition, opportunities and threats, experiences from the USA, UK and Germany, issues around the marketplace, pricing, policing (grey market) and a private label threat. He will also discuss historical records around FMCG and supplier tactics.

The future for Amazon Groceries will be examined, including how the shopper proposition will develop (takeaways, meal kits, organic farmer's markets, Alexa and IOT), the centrality of prime and fast deliveries, price leadership, 3P marketplace and unrivalled range as the main unique selling proposition.

10.25am **Better growth ahead for the Australian grocery sector**
Craig Woolford, Head of Research, Citi Australia and New Zealand

The Australian grocery industry's growth has been suppressed by low price inflation for the past three years. We have seen a point of inflection that signals better growth ahead, but how much better? Craig will explore the drivers of stronger growth, which retailers are driving that growth and how the change in Coles ownership may influence the sector. In addition, there is a resurgence in growth in other channels, albeit more costly and complicated to navigate. Craig will analyse these newer channels for grocery suppliers.

10.55am **MORNING TEA**

Conference Plenary Session 2

11.30am **Consumer expectations in times of deflation or isn't cheaper food enough to make them happy?**
Christopher Zinn, Founder, The Determined Consumer

If the world were fair consumers should be a grateful lot. Food prices are falling with many items cheaper in real terms than ever. Competition and innovation mean they can buy an endless range of groceries from a variety of outlets hardly dreamt of only a decade ago. But we are hardly a happy lot and want even more...so where is it all going to end and how might consumers, retailers and producers get there?

12.00pm **The future consumer**
Mark McCrindle, Social Analyst, McCrindle

Only occasionally in history do massive demographic changes combine with huge social shifts, ongoing generational transitions and unprecedented technological innovation so that within the span of a decade society altogether alters.

Australia is currently in the midst of one such transformation.

While such change impacts everyone and every organisation, the leaders that will future proof their organisations are those who understand the times, influence the trends and shape the future.

In this session Social Analyst Mark McCrindle will navigate food and grocery industry leaders through the megatrends transforming Australia and deliver a snapshot of the Australian consumer, the retail employment landscape and the household of 2025.

He will discuss the key implications of these changes on retail products and emerging needs, emerging and declining sales channels, attracting and retaining top talent, developing a culture of innovation and consumer engagement and community connection.

12.45pm **Think small**
Justin Sargent, Chief Executive Officer, Nielsen Pacific

We are currently witnessing a total transformation of the grocery and consumer goods market, caused by the digital, consumer-centric revolution. We are also witnessing a merging of physical and virtual environments, and there will be increasing pressure and challenges to improve distribution systems and achieve consumer satisfaction.

It's never been harder to grow established brands. But growth is out there. In order to overcome these challenges, companies will need to call on all their available resources and competencies in the drive to increase their knowledge of consumer behaviour.

Any business that intends to be a major player in our market, or to achieve growth, needs to be able to act with speed, agility, decisiveness, great flexibility and, regardless of their size, think small!

1.15pm LUNCH

2.15pm **MAYFAIR BALLROOM**
Concurrent Session 1: The news media's view of the market

Media experts will discuss the way in which the FMCG sector is reported, what the media's role in reporting the sector is and how industry can address the key issues from a public perspective.

Session facilitator: **James Mathews**, Director of Communications, Australian Food and Grocery Council
Panel members:

- Eli Greenblat**, Senior Business Reporter, The Australian
- Sue Mitchell**, Senior Companies Reporter, Fairfax Media
- Adam Connolly**, Founder and Managing Director, Apollo Communications

2.15pm **SAVOY BALLROOM**
Concurrent Session 2 : The importance of brands to the consumer

Being bold is the essence of being a brand- relevance matters
Kjetil Undhjem, Category Director Chocolate ANZ, Mondelēz International

Brands might be challenged, but in a world driven by 'connectedness' relevance is more important than ever. I don't think I have all the answers, but over the last 25 years - across segments, industries and countries - I have found a few principles I believe hold true for building successful brands, as well as my fair share of failures;

- Deriving an understanding of WHY beats all other questions tenfold
- The tighter your position, the broader your opportunity - if you do it right
- Be proud of your heritage, don't fear it; you only screw up if you play it safe

The importance of brands to the consumer
Paul Bull, Managing Director, Real World Marketing

The role of brands in consumer's lives has changed in significant and important ways. Which brands matter, why they matter and the role they play in consumers lives has evolved and will continue to do so. Analysing the changing needs of consumers and shoppers over nearly a decade reveals important insights into what consumers expect of brands, how this has evolved and which retailers, categories and brands are delivering this best. Understanding the expectations consumers increasingly have of brands, why this is and drawing inspiration from brands that have delivered on these opportunities in innovative and impactful ways is the focus of this session.

The importance of building a customer-centric brand during periods of transition
Peter McNamara, Director of Longlife, Space & Insights, Woolworths

Over the past couple of years the Woolworths brand has been going through a period of change and transformation. The focus during this time has been to strive to put the customer at the heart of every decision we make. This includes building robust customer metrics and data which has become the focal point of the organisation.

This session will talk to some of the lessons we have learnt from the more challenging periods in Woolworth's history, some recent examples of customer led decision making at Woolworths and their impacts, and how we have attempted to culturally orientate the organisation around a key set of customer metrics.

3.30pm AFTERNOON TEA

Conference Plenary Session 3 - Savoy Ballroom

4.00pm **The future of commerce: Reconnecting with the consumer - the role of technology and data**
Vanessa Matthijssen, Strategy Partner and National Consumer Products Lead, Monitor Deloitte Australia

From the power of platform players, to the digitally influenced shopper, we are in a world of commerce that is changing... at pace. Winning in this new world is vastly different, and creates a real need to shift the focus from pure retailer relationships and gear toward the consumer connection. To remain relevant and top of mind as a brand, food businesses will need to strengthen their connections with their consumers and the value they offer as a brand - but, how do you best approach this? And what is the role that technology and data could play?

Vanessa will explore the future of commerce and how consumer product companies can reconnect with their consumer to maximise the opportunity that this ever evolving path to purchase provides.

4.30pm **Food and Grocery Code of Conduct Review**
Professor Graeme Samuel AC, Reviewer, Food and Grocery Code of Conduct

5.00pm **Reimagine food provenance with blockchain technologies**
Laszlo Peter, Director, Innovation and Digital Solutions, KPMG Australia

The Australian food industry is facing challenges when trying to respond to emerging consumer and regulatory requirements. The industry is working to find solutions to reduce waste, improve transparency and trust in brands and create a unique selling point of "Australian made" in overseas markets. This session is a showcase of the application of emerging technologies (like blockchain) to deliver on these opportunities and challenges.

5.30pm DAY ONE CLOSE

7.00 for 7.30pm **SAVOY BALLROOM**
Food and Grocery Australia Conference Dinner
Celebrating the Industry!

THURSDAY MAY 24

Conference Plenary Session 4 - Savoy Ballroom

8.30am

The future of customer engagement

Nikki Baird, Vice President Retail Innovation, Aptos

The speed of retail used to be the fastest in all of business, but now the consumer is moving much faster, driven by consumer technologies that are reshaping the entire retail value chain. How are retailers keeping up, and what does it mean for their supplier and brand relationships? Nikki will explore the front lines of competing with Amazon, especially after the Whole Foods acquisition, as well as the many changes in expectations that Millennials and GenZ are bringing to the retail relationship.

9.15am

Who is winning in the slowest growth FMCG market in over 30 years?

Ben Gilbert, Head of Consumer Research, UBS

Ben will present on the results of the 4th annual UBS / AFGC Supplier survey with a focus on who is winning in the market and what the future holds for both retailers and suppliers.

9.45am

How technology can deliver compelling customer experiences

Dr Pallab Chatterjee, Chairman and CEO, Symphony RetailAI

Next-generation technologies spawned outside retail have the imminent potential to help retailers and suppliers generate higher loyalty and improve the integrated in-store, online and mobile customer experience to drive revenue and category growth. Enter Artificial Intelligence (AI). AI holds phenomenal promise for everyone in retail beyond anything we've seen before. But AI can only be as good as the data it is fed. A 360-degree view of customers is key to getting the best out of AI, and delivering intelligent decisions across marketing, merchandising, category management and supply chain. With an AI-enabled, digital assistant you can then respond immediately with deep insights, immersive visualisations and recommended actions. This is a sea change for grocery and high-volume retailers, and their CPG manufacturer partners, and has the imminent potential to significantly transform their business performance.

10.30am

MORNING TEA

11.00am

SAVOY BALLROOM

Concurrent Session 3: Innovation and entrepreneurship: Driving success in competitive markets

Finding the next Uber in food...ways to disrupt your business model

Angeline Achariya, Chief Executive Officer, Monash Food Innovation Centre, Monash University

The key question for successful businesses is how can you reconcile your innovation need today and anticipate tomorrow's need? To surprise, delight and satisfy today's consumer and moving them up the value chain is easy however, we need to design offers for their evolving needs and what they will be able to access. The answer is an innovation portfolio that caters for both using insights at one end (delights today) and foresight at the other (anticipate tomorrow's needs) and guides the kind of projects and innovations one invests in as well as the resources and partnerships for both ends. Foresights and insights will involve very different approaches so tapping in external networks and the flexibility to source expertise as required is key. Whilst insight is reading between the lines and connecting the dots consumers are leading us to, foresights will require first an understanding of what plausible scenarios will our business work within in the future based on the evolution of the science and tech but also what consumers will be accepting and what it means to us. The intersection of these 2 lenses should guide critically a business to design its pipeline of innovations for today and for tomorrow and balance the efforts as required. Research is the only way to guide this outside of guess work and pet projects.

Challenging business as usual

Sarah Prescott, General Manager of Brand Marketing, Thankyou

Sarah will share a story of epic proportions of how Thankyou challenged the system, and continues to challenge the way business has been done to see the realisation of an idea and belief that we all have the power to change stuff. An award winning social enterprise and FMCG brand, Thankyou have had to learn hard and fast, remaining agile as they adapt to the changing consumer goods landscape while fiercely protecting the 100% of profit to Impact model.

Innovation and entrepreneurship: Driving success in competitive markets

Peter Meek, Managing Director, Chobani Australia

Chobani's mission is to provide better food for more people. Peter will provide an insight into how Chobani drives innovation and entrepreneurship to grow its business, and some of the approaches used.

11.00am

MAYFAIR BALLROOM

Concurrent Session 4: Future. Consumer. Now

Consumer-facing industries are on the brink of radical change. Emerging technologies, from robotics to AI and blockchain, will empower and connect consumers in new and challenging ways. Their expectations, preferences and behaviours will change beyond recognition. Based on global research, EY will lead a discussion on how life could change for consumers between now and 2030, assessing what it means for businesses today and tomorrow. A group of executives and industry experts will lead a thought-provoking and innovative session highlighting change to retail, suppliers and consumers alike. The outcome of the session will be a stress-test of your assumptions about the years ahead and equip you to navigate a future that is constantly evolving.

Session facilitator: **Richard Taylor**, Director, Consumer Products and Retail, EY

Panel members:

- **Peter Crone**, Chief Economist, EY
- **Jennie McLaughlin**, Advisory Partner, EY
- **Andre Selton**, Marketing Manager, Plattar

12.15pm	LUNCH
Conference Plenary Session 5 - Savoy Ballroom	
1.15pm	<p>Leading the industry- CEO's views</p> <p>With discussions centring on industry challenges and opportunities through the lens of leadership within the FMCG industry, a panel of former FMCG industry CEO's, will discuss topics such as industry past and future, diversity, investment, business leadership, innovation and industry leadership.</p> <p>Panel facilitator: Chris Klingbeil, Managing Director, Touchstone Executive Search Panel members:</p> <ul style="list-style-type: none"> • Andrew Reeves, former Chief Executive Officer, George Weston Foods • Gareth Edgecombe, former President, Campbell Soup Company Asia Pacific • Warwick White, former Managing Director, Coca-Cola Amatil Australasia
2.00pm	<p>Buying behaviour: The science of nudging consumer decisions Bri Williams, Managing Director, People Patterns</p> <p>Consumers don't always behave the way we expect, impacting conversion and wasting resources. In this session you'll learn:</p> <ul style="list-style-type: none"> • Two mistakes most businesses make when trying to influence consumers; • What behavioural economics is; • Where behavioural economics fits in the customer insights landscape; • How to identify and address the three main barriers to getting consumers to buy.
2.30pm	<p>Coles: Good things today, good things tomorrow John Durkan, Managing Director, Coles</p> <p>In a 10-year turnaround, Coles has reinvigorated itself as one of Australia's leading retail brands. Under John Durkan, Coles has built the success and scale, including a high-performance supply chain, that will enable the business to compete compellingly across all channels for the next decade and beyond.</p> <p>John will outline why the key to future growth in food and grocery is to continue to put customers at the heart of everything we do.</p>
3.00pm	CONFERENCE WRAP UP AND CLOSE Tanya Barden , Chief Executive Officer, Australian Food and Grocery Council

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