



An analysis of consumer trends and implications.

Question for the audience:
how can we prepare for targeting
future opportunities?



How people choose what they eat everyday (**Behavioural Trends**), and most importantly **what drives them to do so**.

By knowing **what drives people**, we can understand **how to target** for growth.

My aim is to **help the produce industry innovate, create brands and engage with people in meaningful ways**.



Carlo Magni

Global Consumer Insights Director
FORWARD INSIGHT & STRATEGY

Let's get 4 key **demographic trends**
out of the way first, these impact:

PEOPLE
FOOD
PRODUCE



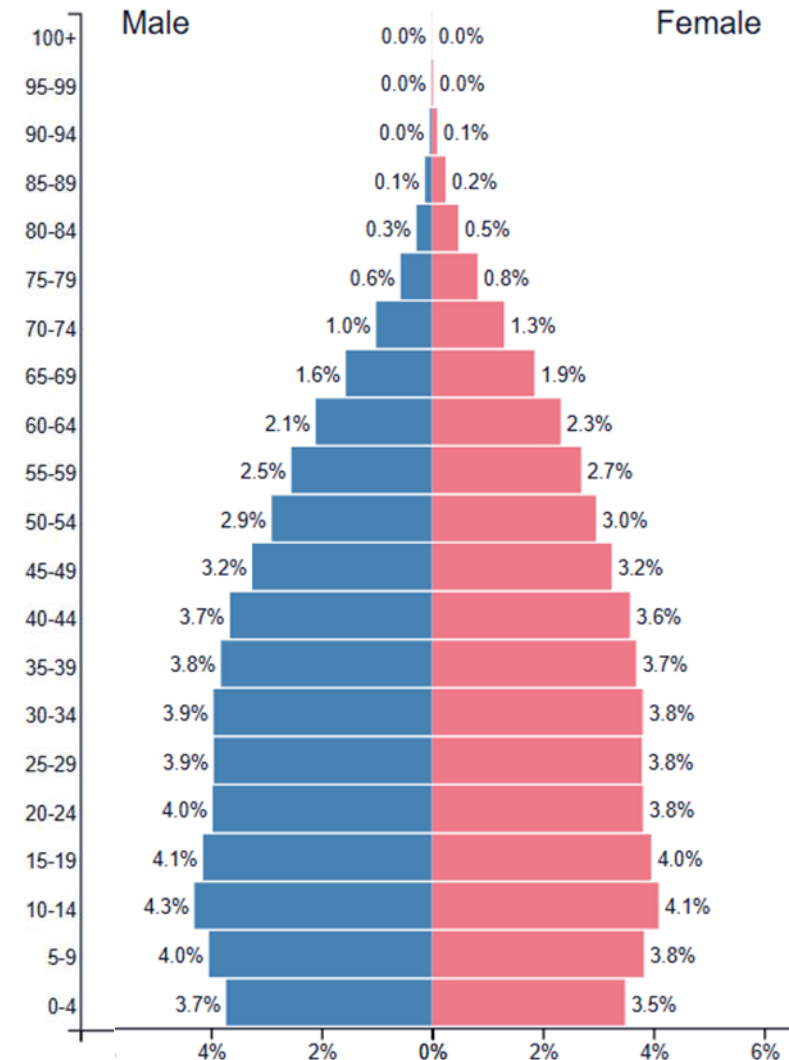
#1

Demographic trend

Strong demographic development continues, impacting who we target as an industry.

- Gen Z and millennials continuing to gain share of population, yet peaking within the next decade in many SEA markets.
- Growing incomes and urbanisation in most markets.
- Inflationary pressure playing a role in the short or medium term – high cost of living perceptions.

SEA 2025



#2

Demographic trend

Digital behaviour continues to grow and evolve

- Across the total population but especially driven by younger generations
- The raise of AI
- Greater availability of technologies constantly improving



Kenny Alhdrin • 1st
Director, Consumer Insights
20h • Edited •



6 in 10 Indonesian internet users are now regular AI users, particularly among Gen Z and Millennials.

A recent Cimigo survey reveals that more than 60% of Indonesians are actively using AI, with 33% saying they use it almost every day. From ChatGPT and Google Translate to Siri, Alexa, and even smart content suggestions on Spotify or Netflix, AI tools are becoming part of daily routines.

But adoption is not equal across all segments. Among non-users, primarily aged 40+, the top barriers include a lack of understanding on how to use AI (50%), data privacy concerns (39%), and the belief that it's not relevant to them (39%).

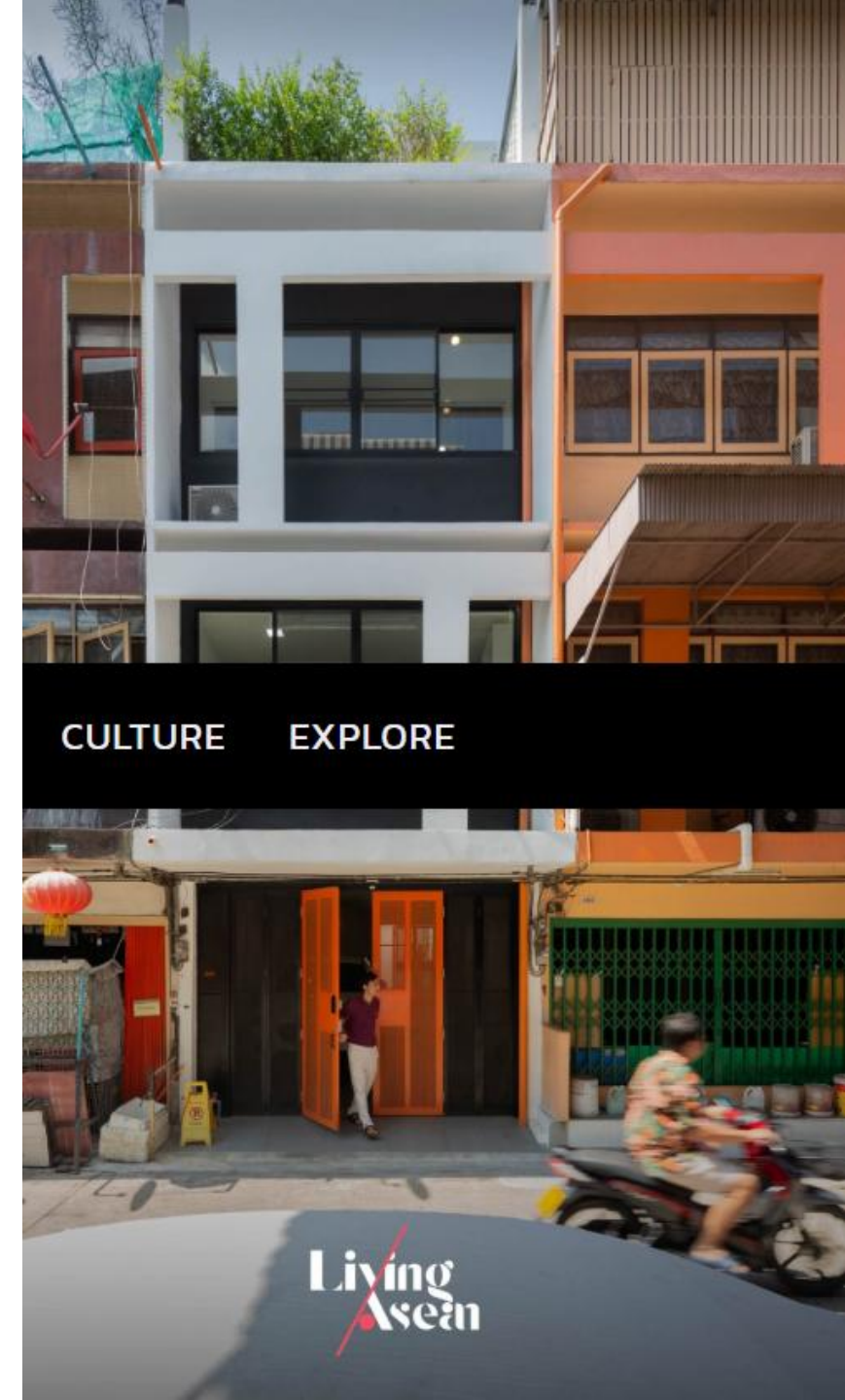
These findings offer a glimpse into how Indonesians are engaging with AI, and where curiosity, caution, and convenience intersect.

#3

Demographic trend

A rise in single-person households

- leading to increased demand for solo living solutions, including tiny living spaces, and single-portion meals as well as transportation solutions.
- Nevertheless, **sharing occasions remain important occasions with fruit**, strongly linked to premium spending especially when sharing has social currency implications or it is linked to events and festivals.



#4

Demographic trend

Modern trade, which includes organized retail formats like supermarkets, convenience stores, and mini markets, continues to grow across the region

- We believe raising middle class will continue to support modern trade development
- Online shopping and related services will continue to grow and adapt to local needs



2 major considerations that will shape the produce industry landscape.

Let's not forget the macro context...

TRADE FREEDOM
CLIMATE CHANGE



When it comes to our industry,
there are 4 key **behavioural trends**

IMPACTING PRODUCE CHOICES



#1

Behavioural trend

CONSUMERS ARE LOOKING FOR EXPERIENCES

WHAT'S THE LATEST SCOOP?



#1

Behavioural trend

CONSUMERS ARE LOOKING FOR EXPERIENCES

Consumers are not only looking for products, but increasingly for experiences.

The **experience economy**, providing consumers with memorable, engaging shopping and consumption experiences keeps growing.

*What
is it?*

WHAT'S THE LATEST SCOOP?



Produce of U.S.A.



#1

Behavioural trend

CONSUMERS ARE LOOKING FOR EXPERIENCES

With the growth of solo moments and extended time on social media, **younger generations are looking to brands to provide excitement and fulfilment.**

Brands can play a role to provide experiences that connect, engage and enable consumers to experience more than ever before.

*Why
is it
happening?*

WHAT'S THE LATEST SCOOP?



Produced in U.S.A.



#1

Behavioural trend

CONSUMERS ARE LOOKING FOR EXPERIENCES

Tap into personalization, emotional relevance, and experience-based consumption.

Create interactive campaigns, combining emotional content and physical experiences, in multi channels.

Work with retailers to transform the shopper experience into entertainment.

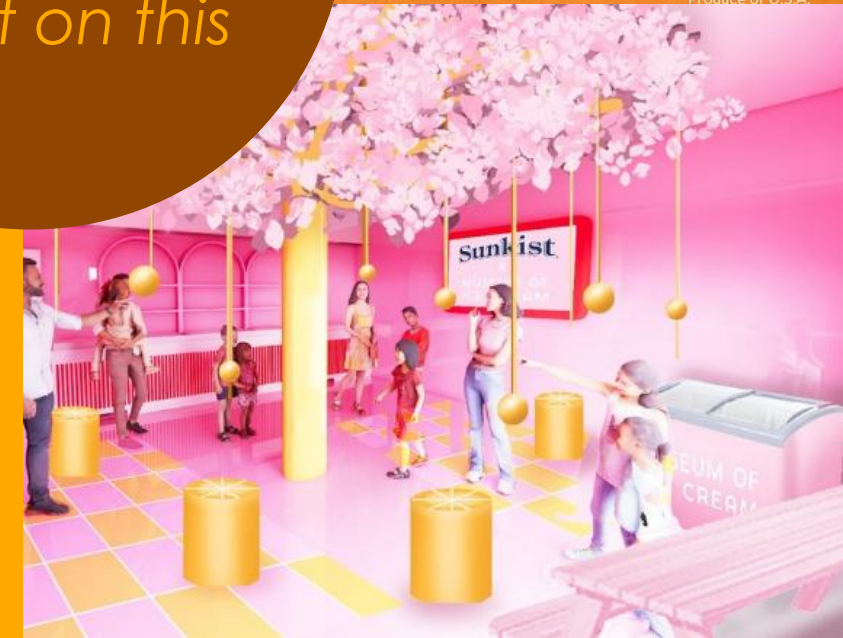
Leen into **feel-good marketing** – how to build positive emotions through food

*How
to act on this*

WHAT'S THE LATEST SCOOP?



Produced by U.S.A.



#2

Behavioural trend

HEALTH CONTINUES TO DRIVE CONSUMERS DECISIONS



#2

Behavioural trend

HEALTH CONTINUES TO DRIVE CONSUMERS DECISIONS

Healthy eating drives consumption of fruit and veggies among younger generations.

Seeking a balance between physical health and mental well-being, consumers are adapting their diets reflecting new advances in scientific knowledge and related health benefits of natural foods.

Digestive wellness is now understood and physically perceived to be an important link to overall wellbeing.

Active lifestyles are also becoming mainstream.

*What
is it?*

SEE
YOU
NEXT
WEEK,
YOU UNSKIPPABLE HERO.



#2

Behavioural trend

HEALTH CONTINUES TO DRIVE CONSUMERS DECISIONS

Scientific advancements in medicine

continue to highlight the importance of food on health and wellbeing.

Covid contributed to create greater anxiety and focus on health.

Growth of **individualistic lifestyles**.

Growth of **middle class** and achievement of **food security**, resulting in people ability to spend time and money on wellbeing.

*Why
is it
happening?*

SEE
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#2

Behavioural trend

HEALTH CONTINUES TO DRIVE CONSUMERS DECISIONS

Prove the health attributes and related benefits of your produce varieties.

Test the benefits of specific diets incorporating specific fruits and vegetables.

Work with key opinion leaders in the health and nutrition space, as well as general practitioners.

Work on creating solutions to facilitate consumers good behaviour such as the Zespri pillbox example.

How
to act on this

SEE
YOU
NEXT
WEEK,
YOU UNSKIPPABLE HERO.



#3

Behavioural trend

**ULTRA
CONVENIENCE,
AT MY DOORSTEP,
NOW!**



#3

Behavioural trend

ULTRA CONVENIENCE, AT MY DOORSTEP, NOW!

Consumers look for solutions for specific occasions and situations and expect them to be tailored and ultra fast.

i.e. most consumers indicate that they would much rather **pay extra for ultra fast** deliveries.

Innovation and marketing teams are increasingly targeting specific occasions with packaging and produce solutions that deliver convenience.

*What
is it?*



#3

Behavioural trend

ULTRA CONVENIENCE, AT MY DOORSTEP, NOW!

In fast moving societies time is wealth. To have more time for what we enjoy is worth more than money.

The access to new technologies that facilitate every aspect of life has delivered huge **gains in convenience across most services; this has reshaped consumer expectations.**

Convenience trend is about **removing tensions** to improve and simplify life.

Why
*is it
happening?*



#3

Behavioural trend

ULTRA CONVENIENCE, AT MY DOORSTEP, NOW!

Identify and solve consumer tensions in convenience – i.e., how to carry large fruit, to have it all year around, to have it preprepared when I want it, to be reminded to use it etc...

Partner with online shopping platforms.

Consider format and packaging innovation focused on convenience and occasions targeting – i.e. precut, washed, precooked.

Think blue sky innovation.. vending machines, AI shopping list integration etc.

How
to act on this



#4

Behavioural trend

SUSTAINABILITY CHOICES ON THE RISE



#4

Behavioural trend

SUSTAINABILITY CHOICES ON THE RISE

Sustainability and value driven choices are increasingly popular.

We observe consumers **making choices across many FMCG categories**, extending to beauty and cosmetics in many markets.

The produce category is still evolving in this space, with packaging innovation, less waste, better varieties with greater resistance to pest and disease.

We are just starting to push sustainability claims and certifications to the forefront of shoppers' decision making. **But there is momentum.**

*What
is it?*



#4

Behavioural trend

SUSTAINABILITY CHOICES ON THE RISE

Shoppers often claim to care about the environment and local communities, which is true, but...

the ultimate driver of sustainability choices is, in most cases, a personal tangible benefit, such as increase health benefits or the expectations of a better eating experience.

*Why
is it
happening?*



#4

Behavioural trend

SUSTAINABILITY CHOICES ON THE RISE

Sustainability claims on their own **struggles** to drive premium, so...

We need to **validate the link between sustainable practices and functional or experiential product traits** with scientific studies.

Steer away from greenwashing.

Consider how can we do good for the planet and the people, throughout our value chain.



What else is happening in produce worth mentioning?

- Global Interest in Asian Fruits
- Tropical Fruit Popularity
- Durian's Continued Popularity
- Frozen Fruit Imports Increase



Key takeaways

- Consumer behavior is shifting towards prioritizing **experiences over products**.
- **Health consciousness** is driving demand for fresh fruits and vegetables.
- **Convenience is a priority** for consumers seeking tailored food solutions.
- **Sustainability** influences purchasing decisions across all demographics.
- Emerging **tropical fruits and Asian varieties** are gaining **global interest**.

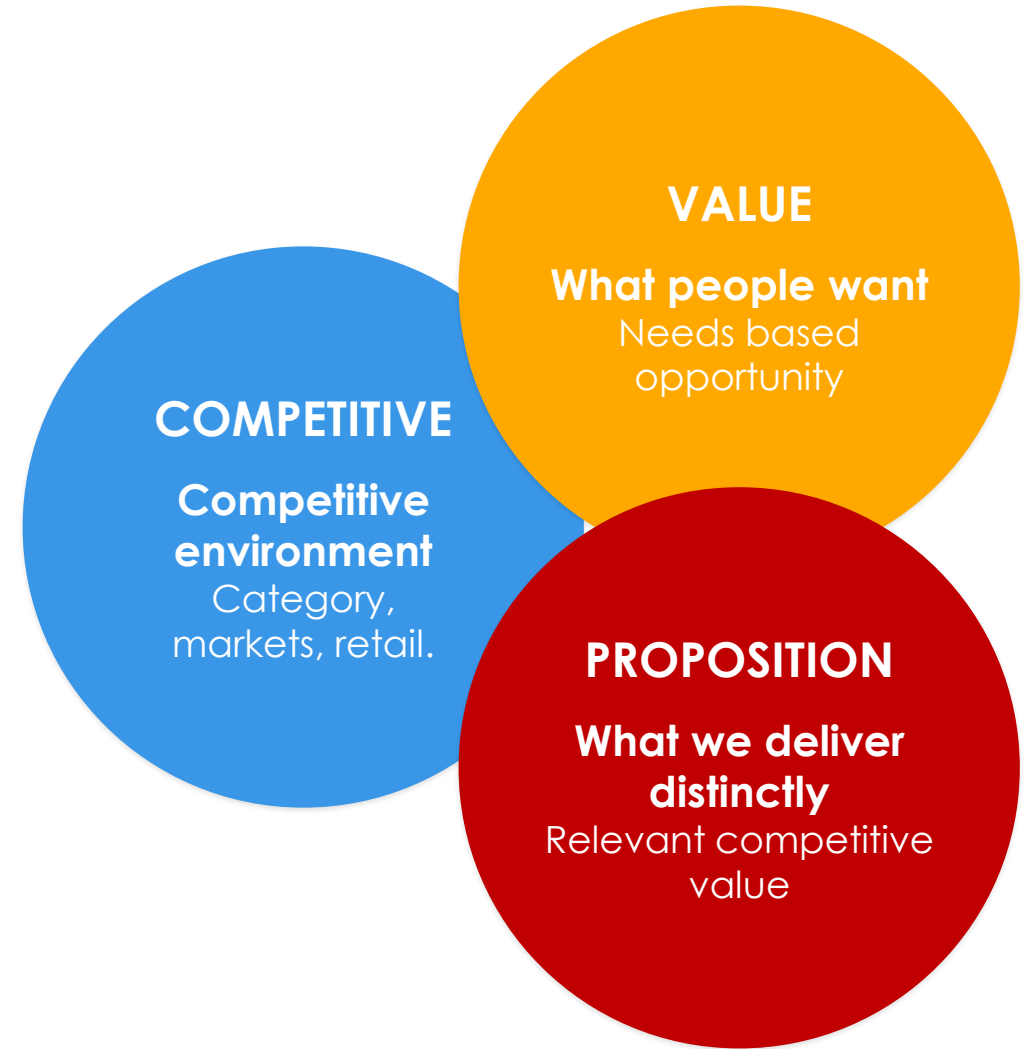
A provocation

How will these trends impact your **Competitive Value Proposition?**

Will it be you or your competitor to act on them first?

Always consider:

- Who to Target
- How to win
- Where to play



Thank you



FORWARD
INSIGHT AND STRATEGY