



final report

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Developing JBS capabilities to identify insights in product, process and packaging to meet market needs

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Executive summary

This project used a systematic approach to reviewing latest developments in packaging and ingredients that will enable JBS to case study opportunity identification in a more responsive to market and customer-needs approach. This may include a number of options:

- Study tours of key international and domestic retail markets of innovative products, processes and packaging
- Series of facilitated targeted supplier workshops on technologies, processes and packaging
- Visits to EU and USA processing works, packaging companies and meeting with consultants to further examine international developments in this area that will inform the development of a value adding strategy and allow JBS to be more responsive to market needs.
- Attending of the international packaging tradeshow (InterPack) event in Dusseldorf Germany in May 2015 to examine the range of exhibits covering packaging, ingredients functionality, materials handling, automation equipment, sensor and imaging technologies, and software / communication for meat and value added products.
- Sealed Air packed forum showrooms (based in France, USA and China)
- SIAL tradeshow in Paris (Oct 2014) and Canada (Apr 2015)
- Anuga in Germany October 2015
- Tailored service provider visits to supplier Head Quarters to demonstrate latest advances and innovations in product, process and packaging.

The project involved a series of study programs, facilitated workshops and merchandising scanning activities designed to examine product, process and packaging developments. The Primary focus of the study was on technologies and processes that may be applied in plants to develop new products, enhance quality and / or shelf-life, address processing efficiency, yield and labour challenges.

A JBS value added technical expert engaged with provider as part of the initial stages of the project. The advisor provided insights through existing current contacts and proven track record in design and delivery of workshops, study tours and merchandising scanning activities. The study included other industries outside the red meat industry and transfers that knowledge as a case study with JBS. At the conclusion of the project, there was a hand over of knowledge and the wider industry in design, scheduling and delivery of supplier workshops, study tours and merchandising scanning approaches to collect and mine information to make process and product improvements to better respond to new market needs. These case studies provided an outline that JBS can follow in the future when designing and implement supplier workshops, study tours including tradeshow, company visits and market assessments and merchandising scanning approaches to identify new market and business opportunities. These new opportunities may further support JBS's Collaborative Marketing program initiatives (i.e. previously ICA program). This project also supplemented JBS's planned involvement in MLA's upcoming Global Innovation Insights Workshop series.

The overall process applied to this project will be used in future to continue to identify insights in product, process and packaging development to meet market needs.

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1 Background

To remain competitive in a highly evolving meat trading market, JBS is expanding its capabilities and capacities in value added lamb and beef products in retail ready fresh meat case and food service markets. Product Innovation and market scanning has been identified as a key imperative to success. JBS therefore proposes to undertake an extensive review of Global innovations in packaging and associated technologies. A provider helped facilitate the design and delivering of a customised program including facilitated workshops, study tours and technology and merchandising scanning activities for JBS with access to well-established company networks and consultant contacts.

The primary objective of this work was to identify innovations in packaging and associated technologies and ingredients to ensure that JBS is placed well in a highly evolving and competitive to service market and customer needs responsively.

2 Project objectives

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The specific objectives of the project were:

- Receive briefings on R&D and technological development approaches being taken in the EU
- learn about the approaches being taken by processors in the EU and by packaging providers;
- examine new smallstock and beef technological advances and critique these in relation to opportunities for Australian processors;
- See how new technologies are being implemented by processors in the EU;
- Understand the capabilities available and emerging;
- investigate and report on a specific issue/area of choice in relation to Australian processing conditions and requirements.

This purpose of the project was to facilitate a case study and approaches that companies may follow to design and implement a study tour including tradeshow, company visits and market assessments to identify new market and business opportunities.

3 Methodology

The scope of this proposed study tour will be undertaken in the following stages:

- 1) Planning & identifying key companies with targeted packaging insights (Stage 1)
 - Provider to design and facilitate travel schedule and present to JBS at pre-study tour briefing.
 - JBS to attend and contribute to the discussion at the pre-study tour briefing.
 - Travel bookings in accordance to the agreed travel schedule. MLA will reimburse, as an expense, reasonable economy/business class travel to/from the start/finishing

point of the tour, and any necessary accommodation associated with achieving the objectives of the project

- 2) Attend Interpack Tradeshow (Stage 2)
 - Visit to packaging companies, consultants, retailers and manufacturers.

- 3) Visit and tours of targeted manufacturing, retailers and packaging companies in Europe and the UK (Stage 3)
 - Visit 5 major retailers in UK plus any additional contact you recommend as discussed over the phone.
 - Special interest in intermediary meal solutions and trends for retail fresh meat case :
 - Packaging trends
 - Flavour trends
 - Meal solution trends
 - Consumer/buyer trends
 - Specific focus on technical and marketing aspects. What's been tried, what worked and what didn't work & why?
 - Visit to manufacturer/processors/suppliers to view packaging, equipment and processes in current use in the following key focus areas :
 - Fresh Meat/meal solutions
 - Dry Ingredients – crusts/rubs
 - Frozen Ingredients – eg cores
 - Wet Ingredients - sauces
 - Focus of the investigation was on how are these combined and packaged for the final product, and impact of shelf life, colour, eating quality, presentation, transportability and innovation.

- 4) Review of technical and trade barriers to entry for major export markets for value added products (Stage 4)
 - Desktop study of technical and market barriers to major export markets
 - Specific focus on tariffs, import duties, quotas, labelling, ingredients and shelf-life

4 Results & Discussion

Pre-scoping and planning process included the following steps:

- Engage and appoint value add facilitator to assist with planning, contacts and targeted visits.
- Provider to design and facilitate workshop with JBS technical, operations and sales and marketing.
- Planning & identifying key companies with targeted packaging insights.
- Preliminary scanning of technology & new products (desktop study) to determine companies and technology targets for proposed study tours.
- A detailed roadmap and schedule for 12 months JBS study of VA processes, product and packaging. Refer to Appendix 1. VA advisor assigned. Define number and types of innovations that will be focused on.
- A portfolio of novel products and packaging formats that were featured in the UK ready to eat markets are shown in Appendix 3.

5 Conclusions

The primary objective of this work was to identify innovations in packaging and associated technologies and ingredients to ensure that Australian processors are placed well in a highly evolving and competitive to service market and customer needs responsively.

The following outcomes were achieved:

- A detailed program schedule (refer to Appendix 1);
- JBS priorities & key targeted outcomes from each initiative is identified;
- The Food People are the consultants who have been appointed to the project within the budgetary constraints of the project. Safari approach will be adopted (see Appendix 2)
- A range of novel products and packaging formats featuring in the UK ready to eat markets (Appendix 3)

The overall process applied to this product will be used in future to continue to identify insights in product, process and packaging development to meet market needs.

6 Appendix



Project PIP.0422 - Developing JBS capabilities to identify insights in product, process and packaging to meet market needs.
Milestone 1 - Program Schedule

Initiative	Details		Targeted Outcome(s)
	Location	Comments	
Study Tour #1	Depart Mel to London UK	Facilitated in UK by Charles Banks - Co Founder of The Food People Accommodation recommended: Kings cross or near Oxford Circus so you are central and have easy access to everything	
	Arrive London UK	Facilitated full-day tour of large retail outlets & store formats including: <ul style="list-style-type: none"> ☐ Tesco ☐ Sainsbury's ☐ Asda ☐ Morrison's ☐ Waitrose ☐ M&S Time permitting, visit Wholefoods, Daylesford Organic, Harrods, Harvey Nicks & Selfridges. Dinner option - Hill & Szrok in London Fields, a butcher by day and restaurant by night!	<ul style="list-style-type: none"> • Review of retail store formats • Butcher / restaurant outlet https://twitter.com/hillandszrok or more conventionally Hawksmoor - http://thehawksmoor.com
		Self-tour of retailers & butchers	<ul style="list-style-type: none"> • Review product & process options in retail & butchers
	Arrive Paris	Self-tour of retailers & butchers <ul style="list-style-type: none"> • Retailer/butcher visit • Philippe LATIL, christian-potier.fr – sauces • Sealed Air / Pack Forum 	<ul style="list-style-type: none"> • Review product & process options in retail & butchers
	Arrive Muick	Tony & Tammy from Multivac, Aust Multivac visit head office & development (1	<ul style="list-style-type: none"> • Site visit Multivac processor/plant visit

		hour from Munich) - current Multivac processor/plant visit CSF pilot facilities	
	Arrive Cologne	24 th – 26 th Mar - COLOGNE Anuga FoodTec Show (3 full days)	<ul style="list-style-type: none"> Review process, packaging and product options at Anuga
	South Germany (TBC)	Visit SCHURBERT ROBOTS	<ul style="list-style-type: none"> Review process & technology developments
	Return to Australia		
Study Tour #1 Debrief Meeting	JBS Brooklyn offices	Project team to review outcomes and review schedule	
Suppliers Workshop #1 - Ingredients	JBS Brooklyn offices	Earlee Products, Favour Maker, Kerry Ingredients, Fibosol, Newly Weds	<ul style="list-style-type: none"> Review ingredients developments & JBS priorities
Suppliers Workshop #2 - Packaging	JBS Brooklyn offices	Multivac, Marel, etc	<ul style="list-style-type: none"> Review packaging developments & JBS priorities
Suppliers Workshop #3 - Products	JBS Brooklyn offices		<ul style="list-style-type: none"> Review NPD JBS priorities
Study Tour #2	Arrive London UK	(5-9 October) <ul style="list-style-type: none"> A round table dinner at Tom's re cook / review what we have brought form retail Meet Wayne & Matt Ellis (Tech Mgr) Meeting David Bates (Head of innovation at Tulip) 	<ul style="list-style-type: none"> Review of AV meat in retail (as above), new format retail stores & independent sector
	Arrive Cologne	(10 – 14 October) <ul style="list-style-type: none"> Anuga Food Show 	<ul style="list-style-type: none"> Review process, packaging and product options at Anuga
Study Tour #2 Debrief Meeting	JBS Brooklyn offices	Project team to review outcomes and review schedule	
Suppliers Workshop #3 –	JBS Brooklyn offices		<ul style="list-style-type: none"> Review NPD JBS priorities

Products & Process			
Study Tour #3	Depart Aust - Brazil	Visit JBS plants & technologies	
	tba		
Study Tour #1 Debrief Meeting	JBS Brooklyn offices	Project team to review outcomes and review schedule	
Project review	JBS Brooklyn offices		

Note: JBS; The Food People; Multivac

7 Appendix 2 – The Food People – Food Safari Process

Get in touch for more info

Food Safari

An extraordinary food journey to inspire the ideas behind market-leading products

1

Research

The only way to be truly inspired by food is to live it. Do your research where it matters on a Food Safari with thefoodpeople. Tell us what you're looking for and let our global food experts guide you on an unforgettable, bespoke trip.



2

Location

Once we've agreed a location, we'll take care of everything. From travel and hotels to where to eat and what to eat, and even down to taking photos and videos and noting down ideas, we'll do it. All you have to do is concentrate on being inspired.



3

Culture



Using our unique knowledge of global food trends and our closely guarded little black book of local contacts, you'll be able to get under the skin of the local food culture. We'll give you an extraordinary insight into the food in front of you.

4

Inspiration

On your tailor-made Food Safari, you'll visit the best markets, dine at the leading restaurants, meet the top chefs and try the tastiest foods. You'll be inspired to create new dishes and products that will set the market alight.



5

Profit



thefoodpeople will make sure that you get return on investment from your trip. We'll note every idea, identify key themes and get you thinking about how you can develop them. You'll go home with clear information on how to turn your inspiration into profit. Book your Food Safari today.

8 Appendix 3 –Products Portfolio



Marks & Spence: (Source- London UK)



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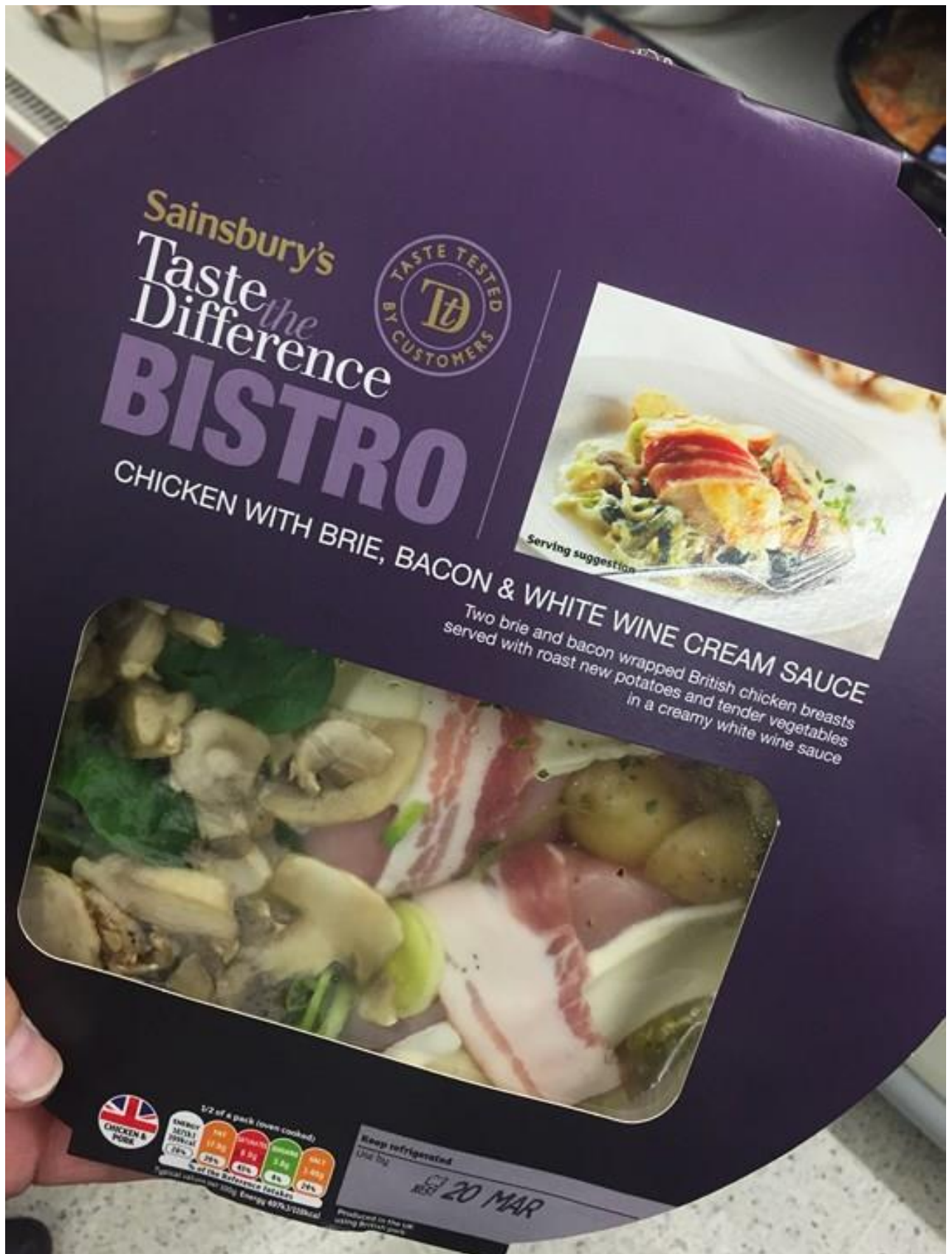


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