



# 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





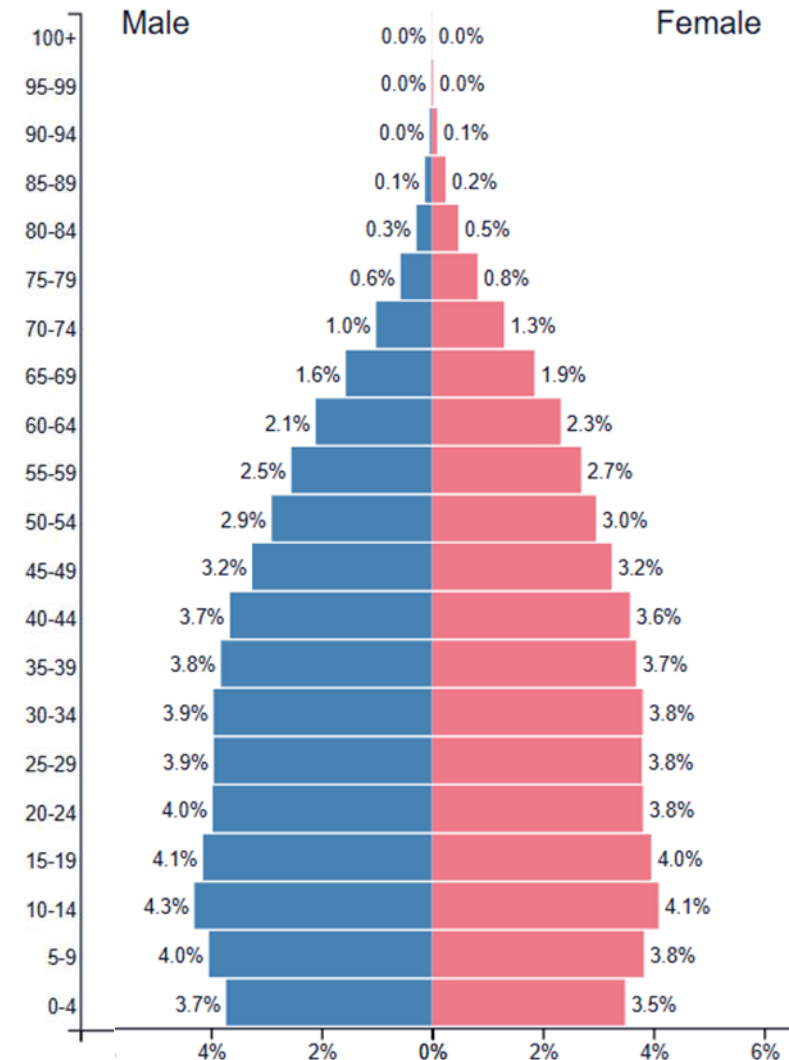
## #1

## 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%).

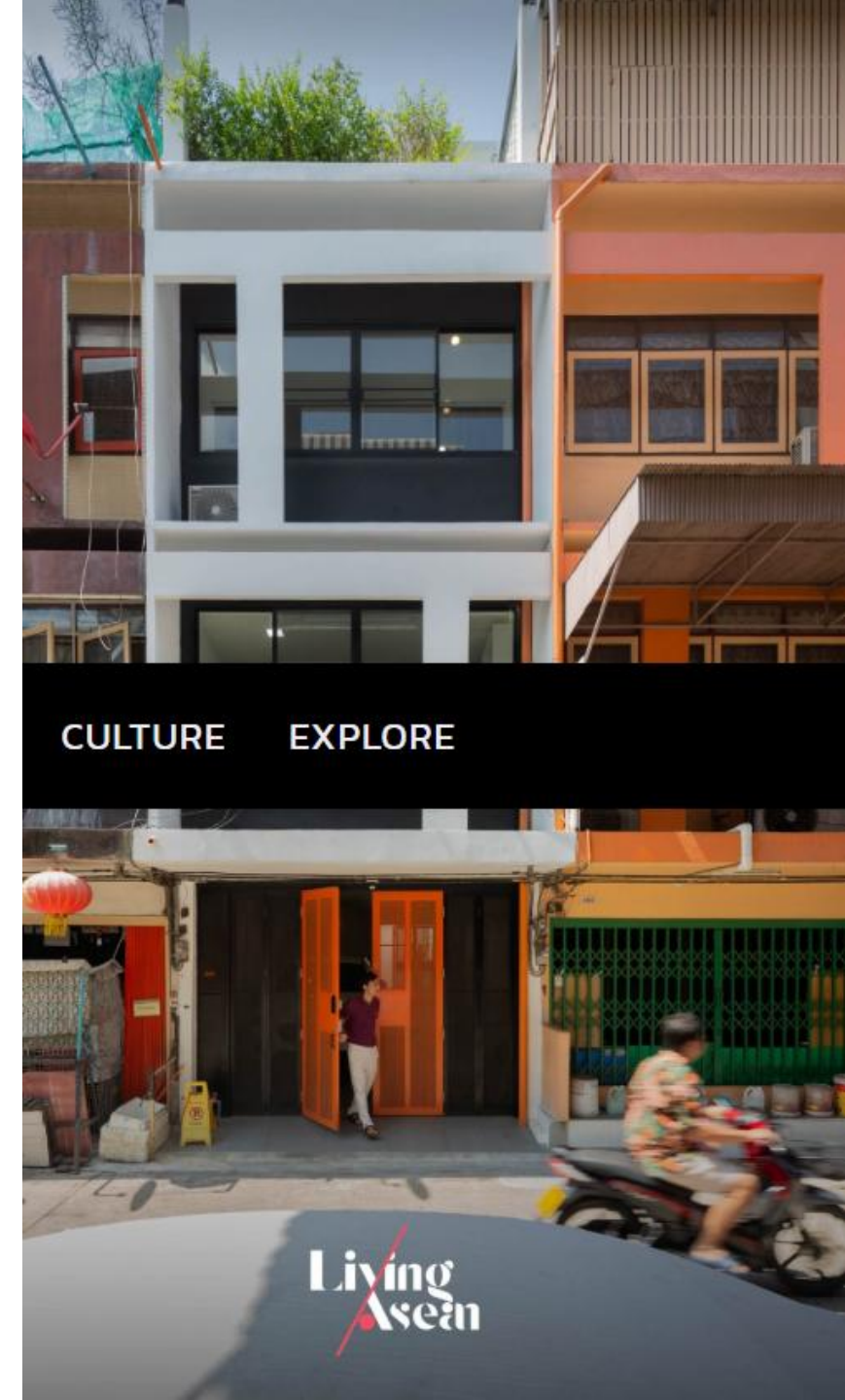
These findings offer a glimpse into how Indonesians are engaging with AI, and where curiosity, caution, and convenience intersect.

# #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?





# #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.

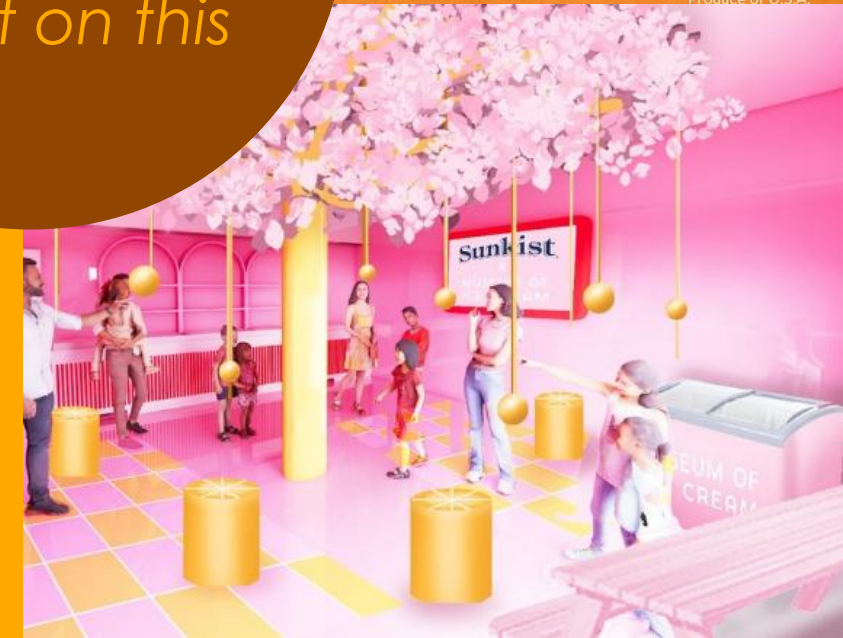
Leen into **feel-good marketing** – how to build positive emotions through food

*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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NEXT  
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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.

*How*  
to act on this





# 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**.

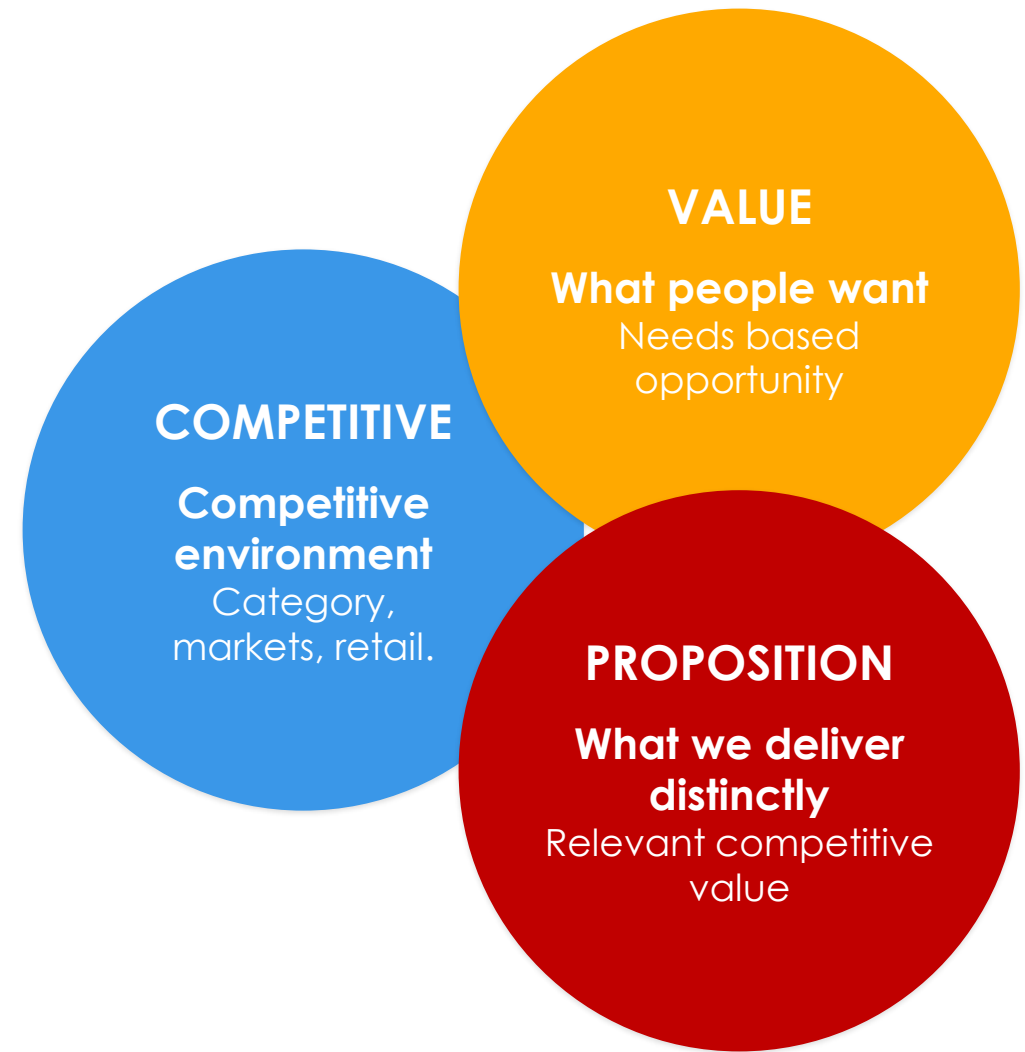
# A provocation

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